

# The Chili Pepper Express Newsletter

October 31, 2007

## President's Corner



Change and Challenge.

These two words describe our daily lives working in healthcare finance. Every day we encounter the challenge of new or revised regulations pertaining to reimbursement, governmental reporting and physician relationships. We learn of new technology that can change our operating processes and staffing requirements. We spend hours reading, reviewing and learning about changes in our work environment.

One resource that we have in dealing with and managing change is HFMA. The Healthcare Financial Management Association National Office staff and members across the country work on analyzing current topics, making recommendations on these subjects that are in the best interest of healthcare providers and reporting to HFMA members on the status and results of those efforts.

Some of the current topics are:

⇒ Inpatient PPS Rule Changes, including:

- “Medicare severity” DRGs (MS-DRGs)
- Area wage index
- Indirect medical education
- Capital rates
- Quality data reporting

⇒ Pricing transparency:

- Provision of cost of treatment prior to service

- Patients consider pricing information in making care decisions
- Collaborative effort of providers, payers, consumers and government leaders

⇒ Healthcare Facility design and planning:

- Integrated strategic and financial planning
- Building efficiency
- Building flexibility
- Composition of construction teams

Reports and articles regarding these and other matters can be found on the HFMA National website at <http://www.HFMA.org/>



Bob Scofield  
STC HFMA President  
2007-2008

HFMA chapters provide information through educational conferences with topics and speakers of current importance and interest to members. Networking with fellow members locally, regionally and nationally provides the opportunity to learn best practices in dealing with the day-to-day challenges and changes. Please see the schedule of upcoming conferences on page 2 of the newsletter.

The members of the education, membership, sponsorship, certification and newsletter committees of the South Texas Chapter deserve a big round of applause for their efforts in serving chapter members. We have much going on this year and can always use a little more help. You can contact me at [bscof@baptisthealthsystem.com](mailto:bscof@baptisthealthsystem.com) or any member of the Board to volunteer. I look forward to seeing you at future events.



### Inside this issue:

Meetings	2
Social Networking Event	2
Managing Investment Risk Through Asset Allocation	3
Welcome New Members	4
CHRISTUS Leadership Development	5
Certification Corner	6
Members on the Move	7
Editor's Alley	7
October Meeting Recap	8
Officers and Directors	9
Other Happenings	10
Sponsors	10

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## Meeting Calendar

Mark your calendars **NOW** so you won't forget to attend STX HFMA's meetings during the upcoming year. Our scheduled meetings are:

Date	Meeting	Location
November 27-30, 2007	HFMA Fall Seminar Series	Hyatt Regency Hotel San Antonio, TX
December 5-7, 2007	Region 9 Conference	Sheraton-New Orleans, LA
January 25, 2008	ACHE/SAHC/STX HFMA Joint Meeting	Sonterra Country Club San Antonio, TX
March 30-April 1, 2008	Statewide HFMA Conference	Driskill Hotel-Austin, TX
April 13-15, 2008	TAHFA Conference	Fort Worth, TX
May 29-30, 2008	STX HFMA Meeting	Sheraton Hotel-South Padre Island
June 23-26, 2008	HFMA Annual National Institute	Mandalay Bay Resort-Las Vegas, NV

Registration Forms and Agendas for each STX HFMA meeting will be distributed by e-mail to all members about one month prior to each meeting date. Registration fees for members are \$95 for online registration, and \$105 otherwise. If you do not receive a Registration Form via E-mail, please check the HFMA National database ([www.hfma.org](http://www.hfma.org)) to ensure your e-mail address is current. If you experience difficulty, please contact Wayne Williams, Chairman of the Membership Committee at [Wayne.Williams@ccsusa.com](mailto:Wayne.Williams@ccsusa.com) for assistance.

## STC Social Networking Event in San Antonio—February 20

The South Texas HFMA will be hosting a social networking event in San Antonio at the MadDogs Pub & Grille on Loop 410 between Nacogdoches and Broadway on Wednesday, February 20, 2008. The event is scheduled to begin at 5:15 p.m. and will last through 8:00 p.m. If you have any questions please call Jimmy Mendez at 210.321.8008.

## Test Your Certification Knowledge

1. When one of the parties to contract does something that he or she was not already bound to do, this can be an example of:
- A. Legality
  - B. Contractual capacity
  - C. Mutual assent
  - D. Consideration

*Answer on page 6*

# Mark Your Calendars

ATTENTION ALL STX HFMA MEMBERS.....please mark your calendar to attend these important upcoming meetings:

**Region 9 Multi-Chapter Meeting in New Orleans—December 5-7, 2007**

**Joint Meeting with ACHE and GSAHC in San Antonio—January 25, 2008**

# Managing Investment Risk Through Asset Allocation

By Pete Seaman, UBS Financial Services, Inc.

How does an investor create an appropriate, long-term investment plan? Spreading assets over a variety of different investments is perhaps the most important rule one can follow. Because no single asset class performs best in all economic environments, the performance of a diversified portfolio is expected to fluctuate less as losses from some investments are offset by gains in others.

Asset allocation is the act of balancing the three common investment classes: stocks, bonds and cash alternatives. Knowing the differences among them is important:

How much emphasis should be placed on stocks for growth, bonds for income and cash alternatives for safety and liquidity will depend in part on an investor's tolerance for risk and the time horizon for pursuing financial goals.

- **Common stocks**, which represent ownership rights in a corporation, entail more risk than other types of financial assets in the short run. But over longer holding periods, they have historically provided the highest returns and the greatest margin over inflation. Common stocks also have the greatest potential for short-term downturns.
- **Bonds** are IOUs issued by corporations, governments and federal agencies. They typically offer higher yields than cash alternatives, but their value can fluctuate dramatically in response to changes in interest rates. Bonds historically have offered higher current income with less volatility than stocks, but have limited potential for increased returns.
- **Cash Alternatives** include money market securities such as Treasury Bills and short-term certificates of deposit. Because these investments have shorter maturities, they typically provide a stable investment value and current interest income. However, inflation can quickly erode the purchasing power of these investments, leaving investors short of reaching their financial goals.

## Diversification within Asset Classes:

As the stock or bond portions of your portfolio are refined, consider spreading investments among the various categories within a single asset class. For instance, diversification of the stock portion among several strategies to target growth stocks, value stocks and blue chip stocks, or across market capitalization in order to own companies of various sizes, whether large, medium or small.

A bond allocation may be diversified to include instruments characterized by specific maturities (short, intermediate, or long-term) or different types of bonds, such as U.S. government, corporate or tax-free municipal bonds. Also consider a mixture of domestic and international stock and bond investments.

## What Should the Allocation Be?

How much emphasis should be placed on stocks for growth, bonds for income and cash alternatives for safety and liquidity will depend in part on an investor's tolerance for risk and the time horizon for pursuing financial goals. If the goal is the near-term purchase of a house or car, it may have a shorter time frame calling for lower- or moderate-risk investment approaches.

A goal like college education or retirement may have a longer time horizon that allows an investor to pursue more aggressive and potentially rewarding strategies because of the ability to wait out any short-term fluctua-

*(Continued on page 4)*

## Test Your Certification Knowledge

2. The Institute of Medicine believes which of the following will improve the quality of care?

- A. The growing complexity of technology
- B. The increase in chronic conditions
- C. The use of evidence-based medicine
- D. A poorly organized delivery system

*Answer on page 6*

# Welcome New Members!

The South Texas Chapter HFMA welcomes the following new members since 7/31/07:

CHRISTUS Spohn Health System

**Melissa Alaniz**  
**Kathryn Babiak**  
**Leticia Bowden**  
**Elizabeth Brooner**  
**Darby DeVries**  
**Jim Fairbairn**  
**Michael Guajardo**  
**Rob Kemp**  
**Rommel Legaspi**  
**Michele Manuel**  
**Lauralinda Moore**  
**Griselda Mota**  
**Kate Newman**  
**Edward Reyna**  
**Rebecca Rios**  
**Louanne Tilton**  
**Charlotte Wiggins**

**Christine An**  
MD Anderson Cancer Center

**Liza Bridgeman**  
Sinaiko Healthcare Consulting,  
Inc.

**April Cortinas**  
CHRISTUS Health

**Mirna Gonzales**  
CHRISTUS Santa Rosa Health Care

**Sonia Greer**  
Seton Family of Hospitals

**Tammie Jones**

**Christina David LeBlanc**  
Valley Baptist Health System

**Natalie Lievense**  
University Of Texas, Pan American

**Santosh Patel**

**Carlos Santillana**  
Valley Baptist Medical Center -  
Brownsville

**Lorenzo Serrano**

**Mona Smith**  
Cardinal Health

**Kenneth Soule**  
Seton Family of Hospitals

**Martha Valladares**  
CHRISTUS Santa Rosa Health Care

**Joe Vasquez**  
North Central Baptist Hospital

**Jose' Vela**  
VBMC-Brownsville

**Belinda Vera**  
Harlingen Physician Network

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## Asset Allocation

*(Continued from page 3)*

tions in the market. Of course, the time won't matter if you misjudge your emotional response to a downturn. For this reason, an investor must always weigh the desire for higher returns against a willingness to tolerate market setbacks.

### Stay on Course:

An effective asset allocation can help balance the risk assumed with the return earned. But it is still important to remember that the stock and bond markets are inherently volatile. All too often, investors become nervous at the first sign of a market downswing and may be tempted to alter their investment plan. By understanding what to expect, an investor will be able to stay on course and resist the urge to revise one's investment mix based on short-term market events.

To find out about asset allocation and how a customized asset allocation strategy may assist in pursuing your financial goals, contact your financial advisor.

Asset allocation does not ensure gains nor can it prevent losses from occurring in a portfolio or account. The information contained in this article is based on sources believed reliable, but its accuracy cannot be guaranteed. This article is for informational and educational purposes only and should not be relied upon as the basis for an investment decision. Consult your financial advisor, as well as your tax and/or legal advisors regarding your personal circumstances before making investment decisions.

# Leadership Development a Priority at CHRISTUS

By Gene Deutscher

Dedicated, informed leadership is a priority at CHRISTUS Health System ("CHS"). An internal leadership development program, THE CHRISTUS ACADEMY ("TCA"), is in its sixth year of existence. TCA is a year long leadership development program dedicated to identifying and further enhancing the leadership and communication skills of emerging CHS leaders.

Annually, interested CHS associates apply for the program. The competition for selection is highly competitive. Each January, the application process commences. Internally, CHS has approximately 1200 mid-level managers who are eligible to apply. Only 30 are selected from the applicant pool each year.

So what are the goals of TCA? The goals are twofold:

1. To provide a development opportunity for emerging leaders who possess the capacity to be high performing leaders in present as well as future positions of responsibility and authority, and;
2. To create a talent pool of TCA graduates for succession planning.

And how does all of this work to the benefit of CHS and those accepted for the year long academic process?

For CHS, TCA focuses on continuity of leadership. The goals of TCA are satisfied through instruction from internal experts, external consultants and current executives, assigned readings and action learning through team projects and assignments. Five two day sessions are conducted during the academic year focusing on such leadership core competencies as strategic planning, mission and values, Catholic healthcare leadership identity, human resources, finance and governance. All of this in addition to each participant's current responsibilities!

The 30 member class is divided into project teams, each team examining strategic priorities. Each team is required to provide "consultant quality" research findings and recommendations at the conclusion of the academic year. These findings and recommendations are presented to CHS executive leadership as well as Regional CEOs.

And here is the good stuff for the selected candidate – a formal commencement exercise is conducted at end of the year to recognize the accomplishments of the graduates!

To date, since the commencement of the program in 2003, 134 CHS associates have graduated from TCA. During this period of time, 45 TCA grads have received promotions to higher levels of responsibility and authority. Nine of the present CHS executives at the system or regional level are graduates of the program. Retention within CHS is high; 78 % of TCA graduates are currently employed at CHS.

Presently enrolled in the TCA program is South Texas HFMA Board member Jimmy Mendez, Sr. Reimbursement Manager for CHS. Here is what Jimmy has to say about how the program is benefiting him eleven months into completion of the year long program:

"I was interested in the program because I had a personal goal of further developing my leadership skills and building confidence in my management decision making capabilities. I spoke to a number of CHS associates who had successfully completed the program. To a person, TCA was highly recommended to me."

Jimmy's immediate supervisor, Julie Holly, a TCA graduate and a member of our South Texas Chapter, provided a great deal of encouragement to Jimmy to apply for TCA admission. He welcomed her encouragement and is appreciative of her doing so.

Enrollment in TCA, Jimmy feels, has benefited him in a variety of ways. He realizes the importance CHS executive management places on TCA. Dr. Royer, CHS CEO, attends each session of the Academy. Additionally, each member of senior executive management presents at one or more sessions of the Academy. This demonstration of active participation from the top has demonstrated to Jimmy and others the importance of leadership development within CHS.

Three pluses are at the forefront according to Jimmy. First, a "360" assessment is completed on each TCA enrollee. The assessment includes evaluations by peers, direct reports, supervisors, individuals outside the CHS family as well as CHS customers.

## Test Your Certification Knowledge

**3. The current ratio is an example of a:**

- A. Capital Structure ratio
- B. Profitability ratio
- C. Activity ratio
- D. Liquidity ratio

*Answer on page 6*

*(Continued on page 7)*

# Certification Corner

By Brenda Cox

## Preparing for Certification

Our chapter is very committed to helping our members become certified in Healthcare Finance and achieve the designation of CHFP. In order to achieve certification, each candidate must successfully pass two exams, the Core exam and one specialty exam.

### Core Exam

The content is general about various aspects of healthcare financial management including accounting and finance, patient financial services, physician practice management and managed care. Typically, learners take about 16 hours to complete this study course. Every certification candidate must pass this exam.

## Test Your Certification Knowledge

**4. When any form of health care is provided to a member in exchange for a scheduled payment in advance of service rendered, this is known as:**

- A. Pre-admission care
- B. Capitated care
- C. Managed care
- D. Up-front care

*Answer below*

### Specialty Exams

- **Accounting and Finance** - The content is specialized in the accounting and finance areas as they are related to the healthcare industry.
- **Patient Financial Services** - The content is specialized in the area of patient financial services and typically takes about 12 hours to complete the course.
- **Physician Practice Management** - The content is specialized in the area of financial management of physician practices. Learners typically take about 12 hours to complete the course. And finally,
- **Managed Care** - The content is specialized in the area of managed care and typically takes about 14 hours to complete.

Printed study materials are available for purchase directly from HFMA's national office at the following link: [http://](http://www.hfma.org/site/certification/self_study_aids_form_0506.cfm)

[www.hfma.org/site/certification/self\\_study\\_aids\\_form\\_0506.cfm](http://www.hfma.org/site/certification/self_study_aids_form_0506.cfm).

Our chapter has a complete study guide set that is available to loan. A chapter member may 'check out' one study guide at a time and use it for 2 (two) weeks. The candidate is responsible for returning the guide upon completion. If you would like to review or look at a guide, please contact me at [bcox@onr.com](mailto:bcox@onr.com) to arrange for delivery.

Another study option is to attend a coaching course at either ANI or through a local chapter event. The coaching course provides an overview of content areas covered on the corresponding exam. The review session helps you learn how to best use the certification study guides to prepare for an exam. If you have already completed some of the self-study materials and review exercises, this session can serve as a review and an opportunity to have your questions answered. A coaching course is scheduled as part of the state-wide HFMA meeting in March 2008 that will be held in Austin.

Finally, local study groups or informal study classes can be part of a study regimen. These small groups can be conducive to discussion and help in the learning process. Members can establish their own study groups in their local areas.

One important point to remember is that the current study materials support exams taken *on or before December 31, 2008*. Exams taken after this date will be based on new curricula for the 2009-2010 period.

**Our next test date is Saturday, December 1, 2007.** The test will be held at the Baptist Health System's School of Health Professions in San Antonio. Please contact me via email at [bcox@onr.com](mailto:bcox@onr.com) or telephone at 512.496.9989 for any questions regarding certification. I hope to see you there!

*Answers: 1) D - consideration; 2) C - the use of evidence based medicine; 3) D - liquidity ratio; 4) B- capitated care*

# Members On The Move



**Carol Reineck, PhD, RN, CNAA-BC**, Chair, UTHSCSA Department of Acute Nursing Care, was recently elected Treasurer, American Organization of Nurse Executives. Carol will also be inducted into the American Academy of Nursing in November 2007. Carol also teaches healthcare financial planning in the master's program in nursing administration at The University of Texas Health Science Center at San Antonio.

On October 11, 2007, **Adam Holzhauer** made a presentation to the New Jersey HFMA Annual Institute in Atlantic City entitled "Options For Unpaid Hospital AR".

**Kim Murphy-Abdouch, RHIA, MPH, FACHE**, recently advanced to Fellowship in the American College of Healthcare Executives.

**Carlos R. Flores** recently moved from Director of National Business Development to Director of Operations at MedaPhase, Inc. in San Antonio.

"Members on the Move" is where we highlight members that have moved to other companies, received promotions within their organizations, or have advanced themselves by way of receiving some Degree, Certification or Awards. It is our way of helping members keep in touch as well as to recognize and congratulate others on their achievements. If you have news which you think should be mentioned in "Members on the Move", please e-mail the information to Becky Turner, NPSC Newsletter Designer at [rturner@npscmgmt.com](mailto:rturner@npscmgmt.com) for inclusion in the next edition of the Chili Pepper Express News.

## Editor's Alley

As always, an important part of this organization's newsletter is input and feedback from you, the members of the South Texas Chapter of HFMA! If you have an idea for an article or feature to be included in future newsletters or have updates for our current features (Members on the Move, Events, etc.), please e-mail them to:

Pete Seaman  
([peteceo1@sbcglobal.net](mailto:peteceo1@sbcglobal.net)),  
Newsletter Chairman

or to Becky Turner  
([rturner@npscmgmt.com](mailto:rturner@npscmgmt.com)),  
NPSC Newsletter Designer.

Thank you for investing your time in a great organization like South Texas HFMA.

## **CHRISTUS Leadership Development**

*(Continued from page 5)*

Second, each TCA enrollee has a "development plan" suited to his/her specific needs with an individual coach assigned to each enrollee. The "coach" comes from within the CHS family.

Finally, an additional benefit to Jimmy is that he has been able to further develop his network within CHS ; individuals with whom he had little or no contact previous to his participation in TCA. He sees this as a real plus that will foster continued communication and collaboration subsequent to his completion of TCA.

Jimmy highly recommends the program to all interested in moving ahead with their individual leadership development skills. **For the Class of 2009, applicants who have been with CHS less than two years will have a pre-requisite class, the week long CHS Center for Management Excellence.** Jimmy sees this as doing nothing more than strengthening TCA and all it represents to CHS. Keep moving, Jimmy, and best wishes for continued success!

# Revenue Cycle & Reimbursement Meeting 2007

By Bob Scofield

The South Texas Chapter's 2007 Revenue Cycle & Reimbursement Conference was held at the El Tropicano Hotel in San Antonio on October 26 was a big success with over 70 attendees hearing presentations on various topics impacting reimbursement for services that we provide to patients.

A reception in the relaxed atmosphere of the El Tropicano on Thursday evening was an enjoyable event with members, speakers and guests enjoying conversation, snacks and drinks.

The conference started Friday morning with welcoming remarks from President Bob Scofield. John Montaine, consulting manager with BKD, followed with an in-depth look at criteria to consider in evaluating managed care contracts. He reviewed such elements as what will be paid, which employers are using that contractor, ease of implementation of the plan and monitoring performance of and compliance with terms of the agreement.

"Valuing Charity Care – HFMA National Perspective" was presented by Craig McKnight, Chairman, Principles and Practices Committee of HFMA. Mr. McKnight stated that charity care policies should be tailored to Community needs, an Organization's mission, an Organization's financial capacity and state laws. He also noted that while charges are the basis for charity care recordkeeping purposes, costs should be the primary unit for valuing charity care. He closed with a discussion of the difference between charity care and bad debts and the importance of segregating the two.

Marlowe Dazely of Phase II Consulting and Kevin Ormand of the Seton Healthcare Network in Austin combined efforts in looking at charge capture optimization. Charge capture is a function that crosses departmental lines, requiring clear communication, consistent processes and periodic audits. An invaluable tool to be used in ensuring that all charges are properly identified and entered in an accurate and timely manner is a Charge Capture team with clearly defined roles and responsibilities in identifying areas of improvement throughout the organization.

Susan Von Kirchoff from the BKD Health Care Group and Erik Shannon, Area Director of Reimbursement for Ernst & Young shared time in giving a detailed review of the Medicare 2008 Inpatient PPS Final Rule and its impact on components of Medicare reimbursement calculations.

Azi Farahmand, CEO of GHN Online highlighted the importance of automation in revenue cycle management. She emphasized the need for the integration of people, process and technology from the steps of patients' first contact and entry into the system with scheduling, registration eligibility verification and financial counseling, through the treatment period including chart completion, charge capture and diagnosis coding to the billing and collection function including interface with payers and patients.

Victoria Garcia and Lonnie Seek of Austin's Seton Healthcare Network shared successes in their approach to motivation and reward for patient access personnel. In overseeing 272 staff members in five hospitals they have orchestrated improvement in insurance verification times and managed care screening times. Demographic errors, MSP screening deficiencies and signature errors have been reduced. All of this achieved with higher staff morale.

## Seminar Topics included:

- *Valuing Charity Care - HFMA National Perspective*
- *No Payment Left Behind: Charge Capture Optimization*
- *Medicare IPPS Changes*
- *Revenue Cycle Automation Trends*
- *Revenue Cycle Personnel Motivation*

**Download the presentations at**  
[www.stxhfma.org](http://www.stxhfma.org)

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# Other Happenings:

“Other Happenings” is where we will list educational and networking opportunities in collaboration with other HFMA Chapters, primarily the Gulf Coast and Lone Star Chapters here in Texas. We will work in conjunction with the Newsletter Chairs from these Chapters to provide you with as many educational opportunities as possible.

## Gulf Coast Chapter HFMA Events:

A full schedule of GCC events can be found at <http://www.hfmatxgc.org/hfmacalendar.php>.

### November 12

**Full Day Educational Symposium**  
**8:00 am - 6:30 pm**  
Houston Hilton Westchase Hotel  
9999Westheimer, Houston, TX  
*Up to 8 CPE Credits*

### January 18

**Monthly Luncheon - 11:30 am - 1:00 pm**  
*CMS Update*  
David Wright  
Physician Practice Committee  
11:00 - 11:30 am

# Chapter Sponsors

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