



Healthcare Finance
Institute.

Healthcare Finance Institute

**NAVIGATING FINANCIAL VITALITY:
STRATEGIES FOR A RESILIENT
HEALTHCARE FUTURE**

APRIL 6TH - 8TH, 2025
The Ritz-Carlton, Orlando, FL



IPMI

International Performance
Management Institute.

PROGRAM AGENDA

Agenda At-A-Glance

- 4:30PM - 6:30PM ● WELCOME ACTIVITY: CHOOSE YOUR OWN ADVENTURE! HOSTED BY FATHOM
- 6:30PM - 8:30PM ● WELCOME COCKTAIL RECEPTION HOSTED BY FATHOM

- 10:30AM - 11:45AM ● KICK-OFF BRUNCH HOSTED BY FATHOM: SAVOR & CONNECT AT GRANDE LAKES ORLANDO
- 11:00AM - 12:15PM ● CHAIRPERSON OPENING REMARKS
- 12:15PM - 1:15PM ● FINANCIAL LEADERSHIP: NAVIGATING HEALTHCARE'S FUTURE
- 1:15PM - 1:45PM ● TURN PATIENT INSIGHT INTO PATIENT DELIGHT: FIVE KEY TAKEAWAYS FROM VOICE OF THE PATIENT SURVEY
- 1:45PM - 2:00PM ● TRANSITION TIME
- 2:00PM - 2:45PM ● THINK TANKS
- 2:45PM - 3:00PM ● TRANSITION TIME
- 3:00PM - 3:45PM ● THE PROCESS OF INVESTING IN HEALTH CARE AI & INNOVATION APPLICATIONS
- 3:45PM - 4:30PM ● FINANCE FORUM: SOLUTIONS FOR COMMON CHALLENGES FACING HEALTHCARE FINANCE LEADERS
- 4:30PM - 6:30PM ● BUSINESS MEETINGS
- 6:30PM - 8:30PM ● WELCOME COCKTAIL RECEPTION & DINNER FUNCTION

- 7:30AM - 8:30AM ● BREAKFAST
- 8:30AM - 9:15AM ● MEDICARE AND MEDICAID REIMBURSEMENT: CRITICAL CONSIDERATIONS FOR OPTIMIZING REIMBURSEMENTS
- 9:15AM - 9:30AM ● TRANSITION TIME
- 9:30AM - 10:30AM ● BUSINESS MEETINGS
- 10:30AM - 1:00PM ● CONCURRENT SESSIONS
- 1:00PM - 2:00PM ● NETWORKING LUNCH
- 2:00PM - 3:00PM ● BUSINESS MEETINGS
- 3:00PM - 3:30PM ● AI, MEET ROI: TRANSFORMING FINANCES AND STRENGTHENING TEAMS THROUGH CODING AUTOMATION
- 3:30PM - 4:00PM ● PLENARY PRESENTATION
- 4:00PM - 4:30PM ● TRANSFORMING DENIALS MANAGEMENT: A DATA-DRIVEN APPROACH
- 4:30PM - 4:45PM ● TRANSITION TIME
- 4:45PM - 5:30PM ● THINK TANKS
- 5:30PM - 6:30PM ● BUSINESS MEETINGS
- 6:30PM - 8:30PM ● COCKTAIL RECEPTION, DINNER AND EVENING ENTERTAINMENT

- 7:30AM - 8:30AM ● BREAKFAST
- 8:30AM - 9:30AM ● ALIGNING VISION WITH VIABILITY: STRATEGIC COLLABORATION BETWEEN CFOS AND CSOS
- 9:30AM - 10:30AM ● BUSINESS MEETINGS
- 10:30AM - 10:45AM ● TRANSITION TIME
- 10:45AM - 11:15AM ● PLENARY PRESENTATION
- 11:15AM - 11:45AM ● FUTURE-PROOFING HEALTHCARE FINANCES: LEVERAGING TECHNOLOGY FOR LASTING SUCCESS
- 11:45AM - 12:15PM ● DRIVING GROWTH: PATIENT PAYMENTS ARE A KEY INITIATIVE FOR FINANCIAL LEADERS IN 2025
- 12:15PM - 1:15PM ● NETWORKING LUNCH
- 1:15PM - 2:15PM ● BUSINESS MEETINGS
- 2:15PM - 3:00PM ● ROUNDTABLE DISCUSSIONS
- 3:00PM - 3:15PM ● TRANSITION TIME
- 3:15PM - 4:15PM ● REVENUE CYCLE LEADERSHIP: BEST PRACTICES FOR OPTIMIZING REVENUE CYCLE PERFORMANCE
- 4:15PM ● CHAIRPERSON CLOSING REMARKS



CONFERENCE SESSION



BUSINESS MEETING



ROUNDTABLE SESSION



MEAL FUNCTION



PANEL DISCUSSION



HEALTHCARE TALKS



THINK TANK SESSION

Featured Speakers



Jason Salgado
CFO,
UNIVERSITY OF PENNSYLVANIA
HEALTH SYSTEM



Brent Davis
CEO, PRIMARY HEALTH DIVISION,
ADVENTHEALTH



Linda Kulhanek
SVP, CFO,
ST. LUKE'S HEALTH



Feby Abraham
CHIEF STRATEGY OFFICER,
MEMORIAL HERMANN HEALTH SYSTEM



Matthew Lester
EVP, CFO & COO,
MEDICAL COLLEGE OF WISCONSIN



Brett McMillan
VP, REVENUE CYCLE,
VCU HEALTH

SATURDAY, APRIL 5TH, 2025

4:30PM - 6:30PM

WELCOME ACTIVITY: CHOOSE YOUR OWN ADVENTURE! HOSTED BY FATHOM

Discover the wild side of Florida with a Grande Lakes Orlando outdoor experience. Attendees will have the opportunity to customize their adventure by choosing from a range of exciting networking experiences like a riverside Eco-Tour, canoeing, fishing excursion, or bird watching exploration. Discover the Ritz-Carlton Orlando's wild side with fellow attendees!

6:30PM - 8:30PM



WELCOME COCKTAIL RECEPTION HOSTED BY FATHOM



SUNDAY, APRIL 6TH, 2025

10:30AM - 11:45AM



KICK-OFF BRUNCH HOSTED BY FATHOM: SAVOR & CONNECT AT GRANDE LAKES ORLANDO

Day One of the Healthcare Finance Institute will start with a vibrant kick-off Brunch, where you'll enjoy delectable delights crafted by the talented chefs at The Ritz-Carlton, Grande Lakes. Set amidst inspiring views, this brunch will offer a taste of the resort's diverse culinary offerings—from fresh, farm-inspired dishes from Whisper Creek Farm to inventive cuisine across 13 unique dining concepts. Join us to savor exquisite dishes, connect with fellow attendees, and begin the Institute in style!

11:00AM - 12:15PM

CHAIRPERSON'S OPENING REMARKS

12:15PM - 1:15PM



FINANCIAL LEADERSHIP: NAVIGATING HEALTHCARE'S FUTURE

Moderator: Linda Kulhanek
CHIEF FINANCIAL OFFICER,
ST. LUKE'S HEALTH



Charity Fannin
CHIEF ACCOUNTING OFFICER,
UNIVERSITY OF MIAMI HEALTH



Matthew Lester
EVP, COO & CFO,
MEDICAL COLLEGE OF WISCONSIN



Renato Suntay
CFO,
MEADVILLE MEDICAL CENTER



While the past few years have presented unprecedented challenges for health systems, healthcare finance leaders have achieved remarkable successes in adapting to the evolving landscape. This panel of Chief Financial Officers and finance leaders will explore various strategies to meet and overcome these challenges while building resilience and leveraging innovation within their organizations. Attendees will gain insights into collaborative approaches that engage the entire C-suite and key team members, addressing crucial priorities for 2025, including:

- **Cultivating a Culture of Financial Discipline:** Ensuring long-term stability through strategic financial planning and rigorous cost control.
- **Enhancing Business Agility:** Leveraging advanced data analytics and AI to drive decision-making, improve profitability, and increase operational efficiency.
- **Sustaining Healthy Revenue Streams:** Developing innovative revenue models to bolster financial stability and strengthen investor confidence in an unpredictable market.
- **Balancing Cost Reduction with Operational Efficiency:** Identifying opportunities for cost savings that do not compromise the quality of care or operational performance.
- **Addressing Workforce Challenges:** Proactively managing the impact of leadership retirements, workforce shortages, and wage inflation by investing in talent development and retention strategies.
- **Embracing Digital Transformation:** Accelerating the adoption of digital technologies to streamline operations, enhance patient care, and optimize financial performance.

This session will set the stage for the three-day program and serve to build the strategic and tactical toolkit CFOs will need to thrive in a rapidly changing healthcare environment.

SUNDAY, APRIL 6TH, 2025

1:15PM - 1:45PM



TURN PATIENT INSIGHT INTO PATIENT DELIGHT: FIVE KEY TAKEAWAYS FROM VOICE OF THE PATIENT SURVEY

Casey Williams
SVP, PATIENT
ENGAGEMENT &
PAYMENTS,
REVSPRING



Patients want healthcare to be as efficient, personalized and consistent as their other consumer experiences. Providers can leverage contemporary engagement solutions to meet—and exceed—patient expectations now. RevSpring will share relevant insights about what patients expect from our 2023 Voice of the Patient research. We'll discuss opportunities to improve the patient experience with consumer-friendly strategies for Clinical, Administrative and Financial engagement. During this session we'll focus on strategies that heighten the patient experience, increase response and improve outcomes including:

- How to boost self-service where patients want it most
- How to make connections between disparate interaction points with your patients to build trust
- How to avoid overwhelming patients by prioritizing communication channels based on behavior
- Motivating patients to respond in positive ways through consistent and personalized engagement
- How closing the gap between patient expectations and their experiences can build loyalty and your business

1:45PM - 2:00PM

TRANSITION TIME

2:00PM - 2:45PM



THINK TANKS

2:45PM - 3:00PM

TRANSITION TIME

3:00PM - 3:45PM



THE PROCESS OF INVESTING IN HEALTH CARE AI & INNOVATION APPLICATIONS

Kimberly
Hodgkinson
STRATEGIC ADVISOR,
FINANCE AND
EXECUTION, MENTOR,
HFMA, CFO,
HOSPITAL SISTERS
HEALTH SYSTEM



Generative Artificial Intelligence (Gen AI) is emerging as a transformative force in healthcare, promising to streamline operations, improve patient outcomes, and drive financial sustainability. In this session, Scott Ulrich, VP of Finance at Houston Methodist, will share insights into the hospital system's approach to navigating and investing in innovation. Moderated by Kimberly Hodgkinson, Strategic Advisor and Finance Mentor for HFMA, this engaging fireside chat will explore how Houston Methodist has implemented cutting-edge technologies, from AI-powered scribes and virtual nursing to predictive analytics, and how these innovations are enhancing both operational efficiency and patient care.

Scott Ulrich
VP, FINANCE,
HOUSTON METHODIST



Houston Methodist has always been at the forefront of healthcare innovation, guided by its Center for Innovation Committee. With an agile, "succeed fast or fail fast" approach, the organization is continuously testing and scaling technology solutions that offer hard and soft savings across its system. From reducing post-discharge mortality rates with predictive analytics to enhancing staff efficiency through AI-powered tools, Houston Methodist's approach to technology is rooted in one core principle: improving care for patients while ensuring operational success.

In this session, you'll gain valuable insights into the process of investing in healthcare AI and innovation, including how Houston Methodist evaluates, pilots, and scales new technologies to ensure long-term success. Don't miss this opportunity to hear firsthand how one of the nation's leading academic medical centers is shaping the future of healthcare delivery through smart, sustainable innovation.

SUNDAY, APRIL 6TH, 2025

3:45PM - 4:30PM



FINANCE FORUM: SOLUTIONS FOR COMMON CHALLENGES FACING HEALTHCARE FINANCE LEADERS

These sessions are designed to provide Healthcare Finance Leaders with insights and information on innovative solutions to help in their day-to-day challenges while also looking to improve overall financial performance of their systems. The following solutions will be explored:

Nick Corrao
SVP,
HEALTHFUSE



Today's revenue cycle leaders are relying on vendors more than ever to get it all done. But how can you ensure you've selected the right vendor, they are charging a fair rate, and they're optimized to their fullest potential? Nick Corrao, Senior Vice President at Healthfuse, will address these questions and more as he presents Best Practices in Revenue Cycle Vendor Management, which highlights:

- Eight (8) Revenue Cycle Vendor Management best practices that can be applied at any organization to ensure optimal ROI from vendor partnerships
- Challenges, success stories, and takeaways from health systems across the country
- An action plan for any hospital finance leader to build a high-functioning vendor management office at their health system

Jeff Johnson
CHIEF CLIENT OFFICER,
PROFESSIONAL CREDIT



Facing challenges like staffing shortages, delayed payments, and regulatory complexities, healthcare organizations must adapt to achieve desired revenue cycle outcomes. In this session, Jeff Johnson, Chief Client Officer of Professional Credit, will share actionable strategies to improve revenue cycle performance despite these hurdles. Topics will include:

- The impact of new tools on patient, provider, and staff experience
- Best practices for communicating with patients about unpaid balances
- Digital communication channels and compliance with regulatory requirements
- The role of behavioral science and analytics in improving financial outcomes

Gain practical insights to maintain recovery rates and navigate the evolving regulatory landscape effectively.

Scott Raberge
SVP,
PFC



The landscape of self-pay receivables is not only shaped by industry changes but also by state and federal legislation. Providers must stay informed about legal developments to ensure compliance and mitigate financial risks. Collaboration with legal and compliance teams is essential for navigating the complex regulatory environment. In some cases, providers may need to consider switching vendors to adapt to the evolving landscape effectively. When evaluating new vendors, prioritizing comprehensive digital capabilities, Omnichannel enhancements, and AI powered analytics is crucial. Despite potential initial challenges, the long-term benefits of improved self-pay receivables management make the transition worthwhile.

4:30PM - 6:30PM



BUSINESS MEETINGS

6:30PM - 8:30PM



WELCOME COCKTAIL RECEPTION & DINNER FUNCTION

MONDAY, APRIL 7TH, 2025

7:30AM - 8:30AM



BREAKFAST

8:30AM - 9:15AM



MEDICARE AND MEDICAID REIMBURSEMENT: CRITICAL CONSIDERATIONS FOR OPTIMIZING REIMBURSEMENTS

Moderator: Amy Mackin
ATTORNEY,
HALL RENDER



Jessica Singh
VP, MANAGED CARE,
VANDERBILT
UNIVERSITY MEDICAL
CENTER



9:15AM - 9:30AM



TRANSITION TIME

9:30-AM - 10:30AM



BUSINESS MEETINGS

10:30AM - 11:15AM



CONCURRENT SESSIONS



INNOVATING HEALTHCARE DELIVERY THROUGH VALUE-BASED CARE

Moderator: David Kelly
VP, REVENUE CYCLE,
MARY RUTAN HEALTH



Brent Davis
CEO, PRIMARY
CARE DIVISION,
ADVENTHEALTH



As healthcare systems across the U.S. tackle the complex shift from traditional fee-for-service models to value-based care, AdventHealth stands out as a leader in navigating this transformation with a focus on sustainable, whole-person care. For Brent Davis, CEO of AdventHealth's Primary Care Division, the mission is deeply personal, rooted in a family legacy of healthcare service that has shaped his commitment to innovation. Leading AdventHealth's Vision 2030 initiative, Brent is pioneering strategies that enhance patient outcomes while addressing the financial realities of markets like Florida, where fee-for-service models continue to dominate.

In this engaging fireside chat, Brent will be joined by David Kelly, VP of Revenue Cycle at Mary Rutan Health, to discuss the operational efficiencies and risk management tactics AdventHealth is employing to support the transition to value-based care. Brent will detail how AdventHealth utilizes partnerships with IT and actuarial experts, as well as risk programs like ACO REACH, to optimize care delivery and reduce hospital and emergency department utilization. Gain valuable insights into the ways targeted, preventative, and whole-person care strategies can drive financial sustainability and quality outcomes—insights from a leader with both personal and professional dedication to healthcare transformation.

MONDAY, APRIL 7TH, 2025

Frank McHugh
CFO,
FRANCISCAN HEALTH



Lydia Edokpayi-
Aluyi
PHYSICIAN ADVISOR,
FRANCISCAN HEALTH



Torra Jones
MEDICAL DIRECTOR OF
PHYSICIAN ADVISORY
SERVICES,
FRANCISCAN HEALTH



11:15AM - 11:30AM

TACKLING STAFFING AND CLINICAL COST VARIATION IN HEALTHCARE

The healthcare industry is facing an array of workforce challenges, from labor shortages and burnout to rising costs and shifting workforce dynamics. This collaborative panel featuring expert leaders in Franciscan Health's staffing, physician practice, and financial arenas will share their insights on addressing the dual challenges of effective staffing and managing clinical cost variation. The session will delve into strategies for navigating the changing needs of the healthcare workforce, including the rise of remote and contingent workers, and how to balance evolving priorities within a constrained budget.

The discussion will explore advanced approaches to reducing clinical cost variation, focusing on the role of automated analytics in achieving sustainable cost reductions. Panelists will share best practices for staffing, retention, and sourcing new labor, as well as lessons learned from their own experiences. Additionally, they will discuss how digital transformation tools have streamlined administrative tasks, improved workforce engagement, and contributed to better financial and operational outcomes. Attendees will leave with actionable strategies for both clinical and financial improvements, along with tips for overcoming common challenges in staffing and cost management.

11:30AM - 12:00PM



TRANSITION TIME

CONCURRENT SESSIONS

Vince Koch
SVP, STRATEGY &
NATIONAL ACCOUNTS,
CLEARBALANCE



12:00PM - 12:15PM

NAVIGATING THE FUTURE: DIGITAL TRENDS REVOLUTIONIZING PATIENT FINANCE AND HEALTHCARE REVENUE CYCLE MANAGEMENT

Join ClearBalance for an engaging session exploring the cutting-edge digital trends poised to revolutionize patient finance. Dive into dynamic discussions on Patient Portals, Digital Health Wallets, Personalized Communication, and Data Analytics in healthcare finance. By fostering a collaborative environment, this session aims to generate innovative solutions to enhance patient engagement, streamline revenue cycle management, and envision the future of healthcare finance. Don't miss this unique opportunity to share insight, learn from industry leaders, and network with your peers. We're not just discussing the future of healthcare finance - we're shaping it.

12:15PM - 1:00PM



TRANSITION TIME

CONCURRENT SESSIONS

BRIDGING THE GAP: ALIGNING OPERATIONS AND FINANCE FOR SUSTAINABLE HEALTHCARE SUCCESS

Jeffrey Hundman
CFO,
LANGDON PRAIRIE
HEALTH



Matthew Lester
EVP, COO & CFO,
MEDICAL COLLEGE OF
WISCONSIN



The convergence of operational efficiency and financial resilience has never been more crucial. As health systems contend with industry-wide challenges like labor shortages, rising costs, and the shift to value-based care, leaders must navigate complex decisions that impact both operational capabilities and financial health. This fireside chat will delve into the intricacies of aligning operations with financial goals to not only streamline costs but also drive quality outcomes for patients. Attendees will gain insight into the strategies healthcare leaders are using to overcome these barriers while maintaining flexibility in a demanding environment.

MONDAY, APRIL 7TH, 2025

Moderated by healthcare finance expert Jeffrey Hundman, this session features an in-depth conversation with Matthew Lester, EVP, COO, and CFO of the Medical College of Wisconsin; Matthew's unique dual role offers a front-line perspective on the need for integrated decision-making between operations and finance. Together, they will explore themes like data-driven insights, cross-functional collaboration, and the growing importance of aligning operational strategies with the financial imperatives of value-based care. Through their discussion, participants will learn how open communication and shared goals across departments can not only reduce costs but also enhance patient outcomes, positioning healthcare organizations for sustainable success.

EMPOWERING FINANCIAL EXCELLENCE: PRACTICAL BUDGETING STRATEGIES FOR HEALTHCARE TEAMS

Effective budget management is essential in today's healthcare landscape, where organizations must balance financial stewardship with high-quality patient care. This session will provide valuable insights into innovative budgeting practices that empower finance teams to develop, monitor, and analyze budgets in real time, highlighting the importance of variance analysis and proactive financial planning as critical tools to navigate both expected and unexpected shifts in healthcare delivery.

Led by Holly Rodillo, Campus CFO & Director of Finance at Northside Hospital, this session will provide practical strategies for enhancing financial literacy and fostering collaboration between finance and clinical teams. Holly will share tools and techniques that make financial analysis accessible and actionable, particularly for finance professionals supporting smaller, rural hospitals with limited resources. Attendees will leave with a practical framework for budget management, applicable across both large health systems and smaller organizations, enabling sustainable financial practices that drive better decision-making and care outcomes.

Holly Rodillo
CAMPUS CFO &
DIRECTOR OF FINANCE,
NORTHSIDE HOSPITAL



1:00PM - 2:00PM



NETWORKING LUNCH

2:00PM - 3:00PM



BUSINESS MEETINGS

3:00PM - 3:30PM



AI, MEET ROI: TRANSFORMING FINANCES AND STRENGTHENING TEAMS THROUGH CODING AUTOMATION

Andrew Lockhart
FOUNDER & CEO,
FATHOM



Staffing shortages, demands for quality improvement, and dwindling clinician and patient satisfaction have been persistent concerns for health system CFOs and leaders. To ameliorate these challenges, forward-looking organizations are adopting AI solutions such as autonomous coding to relieve pressure on both their administrative and clinical teams while unlocking significant margin improvement.

Yogin Patel, MD
MBA, CEO,
APOLLOMD



In this frank panel discussion, Andrew Lockhart, CEO of Fathom, and Dr. Yogin Patel, CEO of ApolloMD, will share their journey implementing autonomous coding technology. Health system leaders will learn from panelists' experiences about how these AI tools overcome staffing challenges, save labor costs, improve accuracy, reduce claims denials, and increase reimbursement – all while freeing up resources and time to focus on improving quality of care and satisfaction.

MONDAY, APRIL 7TH, 2025

Attendees will walk away with an understanding of:

- How to position autonomous medical coding as part of broader AI agendas for providers
- How to measure the financial ROI of autonomous coding
- How to drive operational, security, and data integrity objectives through AI projects

3:30PM - 4:00PM



PLENARY PRESENTATION

4:00PM - 4:30PM



TRANSFORMING DENIALS MANAGEMENT: A DATA-DRIVEN APPROACH

Dominic Foliano
VP, CLIENT DEVELOPMENT, VISIQUATE, INC.



Discover how Envision Healthcare's innovative 1RCM initiative transformed their revenue cycle management through cross-departmental, data-driven collaboration. Learn how this approach effectively harnesses data-driven denials management and RCM improvement strategies, leading to a holistic and synergistic approach to addressing complex challenges in healthcare revenue cycles that unlocks the full potential of denials management, enhancing operational efficiency, and driving organizational success.

Charles Bearham,
CRCE VP, RCM PERFORMANCE, ENVISION HEALTH



4:30PM - 4:45PM



TRANSITION TIME

4:45PM - 5:30PM



THINK TANKS

5:30PM - 6:30PM



BUSINESS MEETINGS

6:30PM - 8:30PM



COCKTAIL RECEPTION, DINNER AND EVENING ENTERTAINMENT

TUESDAY, APRIL 8TH, 2025

7:30AM - 8:30AM



BREAKFAST

8:30AM - 9:30AM



ALIGNING VISION WITH VIABILITY: STRATEGIC COLLABORATION BETWEEN CFOS AND CSOs

Moderator: Matt Leary
MARKET VP OF FINANCE & CFO, UTAH, COMMONSPIRIT HEALTH



Feby Abraham
CHIEF STRATEGY OFFICER, MEMORIAL HERMANN HEALTH SYSTEM



Maureen Halligan
CHIEF STRATEGY OFFICER, COMMONSPIRIT HEALTH SOUTH REGION



Synergies and collaboration between the Chief Financial Officer (CFO) and Chief Strategy Officer (CSO) is more critical than ever to ensure the continued sustainability and growth of health systems. This panel discussion brings together CSOs from leading US hospitals and health systems to explore how CFOs and CSOs can collaborate to craft a strategic vision grounded in financial reality. The discussion will focus on developing an operating system for growth, driving business outcomes with tangible ROI, and aligning strategic ambitions with budget constraints. The session will seek to explore the following areas:

I think you're trying to cover too much here and some of these are less strategic and more operational / tactical; I suggest reducing to a few key bullets.

- Strategic Planning & Financial Alignment: Crafting a cohesive strategy that aligns growth initiatives with financial feasibility.
- Revenue Growth and Diversification: Exploring new revenue streams and strategic partnerships for aligned growth.
- Risk Management and Financial Resilience: Mitigating financial risks and building resilience in the face of economic uncertainties.
- Innovation and Digital Transformation: Strategically investing in technologies that enhance efficiency and deliver ROI.

This interactive panel will offer practical strategies for balancing ambition with financial stewardship, ensuring organizational success in a competitive healthcare environment.

9:30AM - 10:30AM



BUSINESS MEETINGS

10:30AM - 10:45AM



TRANSITION TIME

10:45AM - 11:15AM



PLENARY PRESENTATION

11:15AM - 11:45AM



FUTURE-PROOFING HEALTHCARE FINANCES: LEVERAGING TECHNOLOGY FOR LASTING SUCCESS

Casey Schirk
VP, IODINE



Amidst shrinking profit margins and escalating staffing and supply costs in healthcare, providers must go beyond cost-cutting. Unlocking revenue from existing sources through technology in the mid-revenue cycle offers a sustainable solution, without the need for extra hiring or costly consultations.

TUESDAY, APRIL 8TH, 2025

11:45AM - 12:15PM



DRIVING GROWTH: PATIENT PAYMENTS ARE A KEY INITIATIVE FOR FINANCIAL LEADERS IN 2025

Amy Carpenter
VP, STRATEGIC
ACCOUNTS,
FLYWIRE



What steps are financial leaders taking to make the biggest impact in 2025? In a recent survey of 300+ senior financial leaders in healthcare, over 80% named shortening days in AR, balancing patient affordability with collections, and patient loyalty as key initiatives. With these goals in mind, it's easy to see why providers are prioritizing upgrading the patient payment experience. Designing a modern patient payment infrastructure can increase the likelihood that patients pay their bill, refer others to your services, and return themselves. In this session, leading patient payments and financial engagement company, Flywire, will lead a discussion around how to design a consumer-driven payment process that helps providers drive growth and meet key business outcomes in 2025.

12:15PM - 1:15PM



NETWORKING LUNCH

1:15PM - 2:15PM



BUSINESS MEETINGS

2:15PM - 3:00PM



ROUNDTABLE DISCUSSIONS

Sandi Weiss
VP, ENTERPRISE
FINANCE,
BERGEN NEW BRIDGE
MEDICAL CENTER



BALANCING THE BOOKS: STRATEGIC BUDGETING AND CASH-FLOW MANAGEMENT

Financial leaders in healthcare are under increasing pressure to manage rising labor and supply costs while navigating decreasing reimbursements. As hospitals face the financial strain of inflation and evolving payment models, a comprehensive budget becomes essential. Led by Sandi Weiss, VP of Enterprise Finance at Bergen New Bridge Medical Center, this roundtable discussion will explore how hospitals can manage cash flow amidst challenges like Medicare reductions, Medicaid changes, and staffing shortages. Sandi will share her experiences from New Jersey, while engaging participants in a dialogue on state-specific issues, such as behavioral health funding changes and AI-driven cost management tools.

The session will cover techniques for explaining budget discrepancies to boards, balancing revenue with expenses, and leveraging artificial intelligence for financial resilience. By sharing best practices on cost control and resource allocation, participants will gain actionable insights for achieving financial stability and organizational sustainability.

Jason Salgado
CFO,
UNIVERSITY OF
PENNSYLVANIA HEALTH
SYSTEM



STREAMLINING CARE: COLLABORATIVE APPROACHES TO ELIMINATING PREAUTHORIZATIONS IN HEALTHCARE FINANCE

In today's healthcare finance landscape, eliminating imaging and insurance preauthorizations is transforming patient care and administrative efficiency. This interactive discussion will explore how removing preauthorization requirements can streamline workflows, reduce administrative burdens, and enhance the patient experience. With exemplary insights from the University of Pennsylvania Health System's collaboration with Independence Blue Cross (IBC), this session will delve into the power of hospital-insurer partnerships to minimize delays and create a seamless patient journey.

TUESDAY, APRIL 8TH, 2025

Facilitated by Jason Salgado, CFO of the University of Pennsylvania Health System, the discussion will encourage participants to share their experiences and strategies in managing preauthorization challenges. Attendees will have the opportunity to discuss the impact of automation and how innovative tools can reduce the need for additional staffing by automating records and simplifying processes. Join peers in exchanging insights on how to foster effective payer relationships, streamline ordering patterns, and implement practical solutions that prioritize both patient care and operational efficiency.

OPTIMIZING UPFRONT PAYMENTS: LEVERAGING LEADERSHIP AND TECHNOLOGY

With rising patient costs and challenging reimbursement landscapes, healthcare providers are increasingly focused on securing upfront payments to enhance financial stability and reduce administrative strain. This interactive roundtable will encourage participants to exchange strategies for optimizing payment solutions in fast-paced healthcare environments. As technology advances, the challenge is not only choosing the right tools but also leveraging the expertise of financial leadership to maximize efficiencies and drive successful payment processes.

Led by Danielle Reese, Executive Director of Finance at UNC Health, the collaborative discussion will examine effective approaches to reducing payment denials and creating streamlined, patient-friendly payment experiences. Key topics will include how to harness automation tools and platforms, such as EPIC, to simplify payment workflows and improve collection rates. Participants will explore best practices in using in-house platforms to their fullest extent while identifying when external support can enhance outcomes. Attendees will share insights on leadership skills that drive effective implementation, balancing high-tech solutions with high-touch communication for cleaner, more efficient payment processes.

3:00PM - 3:15PM

TRANSITION TIME

3:15PM - 4:15PM



REVENUE CYCLE LEADERSHIP IN 2025: STRATEGIES FOR ENHANCED PERFORMANCE AND FINANCIAL SUSTAINABILITY

As healthcare faces rapid shifts in payment models, regulatory requirements, and consumer expectations, effective revenue cycle management has become essential to maintaining financial stability. In 2025, healthcare leaders must address the complexities of healthcare consumerism, digital transformation, and competition from nontraditional players, while ensuring positive patient-centered financial experiences. This includes advancing coding accuracy, adjusting to payer mix changes, and implementing IT system integrations that support seamless, efficient processes. Healthcare organizations are under increased pressure to innovate and streamline revenue cycle management to secure consistent cash flow and ensure financial resilience.

Danielle Reese
EXECUTIVE DIRECTOR
OF FINANCE,
UNC HEALTH



Moderator: Casey
Williams
SVP, PATIENT
ENGAGEMENT &
PAYMENTS,
REVSPRING



TUESDAY, APRIL 8TH, 2025

David Kelly
*VP, REVENUE CYCLE,
MARY RUTAN HEALTH*



Brett McMillan
*VP, REVENUE CYCLE,
VCU HEALTH*



Sheldon Pink
*VP, REVENUE CYCLE,
LUMINIS HEALTH*



Andrea Stewart
McGruder
*VP, PATIENT FINANCIAL
SERVICES,
FRANCISCAN
MISSIONARIES OF OUR
LADY HEALTH SYSTEM*



4:15PM

This panel of leading Revenue Cycle Executives will discuss the latest best practices and innovative strategies for optimizing revenue cycle performance. These experts will share insights into breaking down silos, enhancing transparency, and leveraging technology to support sustainable, patient-focused revenue cycle practices. Attendees will gain actionable strategies to navigate industry challenges, drive continuous improvement, and foster collaboration across departments, positioning their organizations for success.

CHAIRPERSON CLOSING REMARKS



VENUE

APRIL 5TH - 8TH, 2025

The Ritz-Carlton, Orlando, FL

Inspired by the grand palazzos of Italy, The Ritz-Carlton Orlando, Grande Lakes is Central Florida's luxury resort. With over 57,000 square feet of meeting space, ideal for corporate gatherings of any size, The Ritz-Carlton Orlando, Grande Lakes features expansive, luxurious ballrooms that are tailor-made for both small groups and large conferences, delicious catering, and a detail-oriented team that will enchant guests with a memorable experience.



REGISTRATION INCLUDES:

- 2 nights' accommodation at the Resort
- All group meals and cocktail receptions for the duration of the Institute
- A customized itinerary highlighting the Thought Leadership Sessions, Business Meetings and Networking Functions that you have selected
- Dedicated pre-event, post-event and onsite logistics assistance by an IPMI Operations Manager
- Access to Presentation Materials post-event

