



# MetroLines

*A Newsletter from the Metropolitan Philadelphia Chapter of the  
Healthcare Financial Management Association*

November 2004

## Upcoming Events

### NOVEMBER

- November 17, 2004  
*Revenue Cycle  
Management*
  - Location: Holiday Inn,  
4<sup>th</sup> and Arch

### DECEMBER

- December 19, 2004  
*Certification Exam:  
9:00 a.m.  
Registration  
Required*
  - Location: Saint  
Joseph's  
University
- December 21, 2004  
*Improving Your  
Bottom Line  
Through  
Performance  
Improvement*
  - Location: Thomas  
Jefferson  
University  
Hospital

### JANUARY

- January 12, 2005\*  
*Legislative Dinner  
Meeting*
  - Location: Adams  
Mark Hotel

\*Please note date  
change.

## Message from the President

Dear Fellow HFMA Members:

As you will see, this issue of MetroLines is "About Us", that is, about the Metropolitan Philadelphia Chapter of HFMA. The thought in putting this approach together for this edition was to inform new members more fully about our Chapter, while reminding renewed members of the goals and structure that have been put in place to serve you as members.

Included in this addition are Selected Highlights of our current Strategic Plan, our Annual Budget, and the current Chapter Leadership. Together, these elements form the core of the how we are focusing on meeting your needs, and who is taking the leadership role on your behalf as fellow members to make it happen. Please take a few minutes to become more familiar with this information and consider expanding your own involvement in our chapter's activities.

Our year is off to an excellent beginning. Approximately 100 of you attended the first Program and Education Committee Meeting on September 30<sup>th</sup>. Our chairpersons, Tony Scarcelli, Chris Kops and Anne Saputelli led the Committee in developing an extremely worthwhile program covering the 2004 elections, along with an excellent series of speakers addressing Capital Financing issues. Programs such as these reinforce the value and importance of our Chapter and HFMA overall by bringing forward education that strengthen our vision of enhancing the delivery of healthcare services by serving as the leading professional resource.

The list of upcoming programs enclosed in this edition of MetroLines provide additional opportunities for you to strengthen your own professional development and assist your organizations in responding to the many challenges that face health care financial managers.

Please let any of our Chapter Leadership team know how we can better serve you as the chapter year continues. I wish you all continued success in your important roles in our health care system.

Pete DeAngelis

# Message from the Editors

## FEBRUARY

- February 16, 2005  
*Physician Practice Management Meeting*
  - Location: Thomas Jefferson University Hospital
- February 27, 2005  
*Certification Exam: 9:00 am. Registration Required*
  - Location: Saint Joseph's University

## MARCH

- March 10, 2005  
*Reimbursement Seminar*
  - Location: La Salle University

## APRIL

- April 2005  
*Decision Support Program*
  - Date: TBD
  - Location: Crozer
- April 24, 2005  
*Certification Exam: 9:00 am. Registration Required*
  - Location: Saint Joseph's University

## MAY

- May 26, 2005  
*Meeting and Golf Outing*
  - Location: Paxon Hollow Country Club

As our current Metropolitan Philadelphia Chapter of the HFMA fiscal year kicks into full swing, we would like to take an opportunity to publish this Newsletter as a "Get to Know Your Chapter Newsletter". We hope that this Newsletter will provide an opportunity to familiarize our members with the many great programs and events sponsored by our Metropolitan Philadelphia Chapter, introduce new members to our local Chapter details, and provide our members with key information regarding the Leadership, Committees, and Vision of our Chapter.

In this Newsletter, we have identified the key components of our Chapter's strategic plan, provided a high level summary of our Chapter's budget; identified our Officers, Committees, Committee Chairs, and provided detail on the upcoming programs and events scheduled for the current year. We hope that everyone finds this Newsletter informative and takes advantage of the local Chapter events, which offer opportunities to enhance our professional growth and experiences, and develop friendships with our fellow members of the Metropolitan Philadelphia Chapter of the HFMA.

We would also like to, on behalf of the members of our Chapter, recognize all of the efforts of the Committee Chairs, as well as the members of the individual Committees, who contribute their time and energy to planning the Metropolitan Philadelphia Chapter programs and events. We understand the time and efforts that go into planning these events for our members and appreciate the hard work and dedication to make these events successful.

As the Newsletter Chairs, we welcome any suggestions of things you would like to see in our Chapter's Newsletter and solicit any ideas or suggestions to make these Newsletters more informative and beneficial to our members. Also, we would like to welcome anyone interested in submitting an article for upcoming Newsletters, to please let us know. We hope that each of you continue to take advantage of the many opportunities offered within our Metropolitan Philadelphia Chapter of the HFMA, and continue to enjoy your experiences with your fellow local HFMA members.

One minor housekeeping note, beginning with the Summer 2004 Newsletter, we issued the Newsletter via email and regular mail. We plan on sending upcoming Newsletters to our members via email unless there is no email address available for our members. If you would prefer to receive these Newsletters via the regular mail, instead of the email correspondence, please let us know and we can send you a copy of the upcoming Newsletters via regular postal service.

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### **Treasurer**

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### **HFMA Directors**

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# Strategic Plan for Service, Quality and Growth, June 2004

## Selected Highlights

### **Executive Summary**

The Metropolitan Philadelphia Healthcare Financial Management Association Chapter must address the same challenges and stresses that its members are experiencing in the healthcare organizations that they represent – the effects of cost containment, increased public scrutiny, and complicated payment mechanisms. Our goal, as outlined in this plan, is to enhance our current position by continually evaluating the needs of our members, the cost and quality of our programs and our response to the social, political, and technological factors that affect the healthcare environment.

### **Chapter Foundation**

#### **A. Vision Statement**

The Healthcare Financial Management Association will enhance the delivery of healthcare services by serving as the leading professional resource to financial managers in all healthcare settings.

#### **B. Chapter Mission**

The Metropolitan Philadelphia Healthcare Financial Management Association is the professional membership organization for individuals involved in the financial management of healthcare. The Metropolitan Philadelphia Healthcare Financial Management Association serves and represents members by:

Providing professional development through education, information, certification, peer interaction, and leadership training;

Influencing healthcare financial management and accounting policy decisions, principles, and practices through advocacy and dissemination of information; and

Establishing and promoting the highest standards of professional and ethical conduct.

#### **C. Chapter Values**

The values of the Metropolitan Philadelphia Healthcare Financial Management Association are:

- Service – We believe that service to members is our highest priority.
- Excellence – We believe in excellence in all that we do.
- Teamwork – We believe that teamwork is essential in meeting the objectives of HFMA.

- Importance of Individuals – We believe in the importance of the growth of individuals.
- Innovation and Creativity – We believe in encouraging innovation and creativity.
- Financial Responsibility – We believe in conducting the HFMA with financial responsibility and a prudent approach to business.

## **Chapter Goals and Objectives**

### **A. Goals for Service and Quality to Members**

#### **Key plans for the next three to five years include:**

1. We will strive to provide quality, accessibility and value to the services that we provide to our members. In order to provide continued value, Chapter leaders will focus on the following initiatives.
  - Continue to provide educational sessions on relevant topics to our members including the topics mentioned in the membership survey. Additionally, we will continue to liaison with other professional organizations to enhance available educational opportunities.
  - Encourage members to attain FHFMA and CHFP certification. Since the Chapter has initiated efforts to ease the certification process, several Chapter members have achieved certification. We will schedule additional test dates during the upcoming year, promote the certification process at all Chapter events, and investigate a roving proctor program to bring testing to educational meetings.
  - Continue to evaluate program pricing and program content to insure the price and topics are relevant to our members. We will also implement a series of teleconferences to allow busy individuals to receive educational opportunities without leaving their offices.
2. We will provide a seamless system of service that connects our members to the information, resources, ideas, and relationships that will strengthen their careers. In order to work toward this goal, Chapter leaders will concentrate on the following initiatives.
  - Continue to focus on our new members to insure they are connected to the Chapter. We will also continue to invite new members to Chapter educational sessions free of charge and recognize them at the meetings.
  - Benefits of membership will be promoted in our member communications by having Chapter leaders outlining benefits to their careers of HFMA membership.
  - Members who have not renewed their membership will be contacted to determine what expectations of membership were not met that impacted their renewal decision. Based on this dialogue we will determine other efforts to retain membership in the future.
3. We wish to be recognized as the most relevant and valuable resource for senior financial executives and other individuals within their organization's

financial structure.

- Senior financial executives will be contacted to assess their perceptions of the Chapter. The goal of these discussions we will be to determine what type of education would be most beneficial to this group of individuals as well as how the Chapter could best educate and serve the staff level employees within their organizations.

4. We are projecting a 1% growth of membership for the Chapter.

- We will focus on membership retention to insure that all members renew their memberships in a timely manner. Membership communications will include reminders to our members.
- During discussions with the senior executive group, we will encourage their efforts to insure their staff members are encouraged to join the HFMA.
- We will focus on areas where we had membership decline by contacting non-renewing members to determine how we could better serve their needs through education and other efforts.

#### **MEMBERSHIP BY ORGANIZATION TYPE**

<i>Organization</i>	<i>Members 2004</i>	<i>Members 2003</i>	<i>% 2004</i>	<i>% 2003</i>
Accounting Firms	41	38	4.4%	4.1%
Ambulatory Care	4	4	0.4%	0.4%
Collection Service	31	25	3.3%	2.7%
Consulting Firm	140	130	14.9%	14.2%
Education Institution	21	13	2.2%	1.4%
GPO	1	1	0.1%	0.1%
Health System/Corp	175	173	18.7%	18.9%
Health Care/Ins Company	25	31	2.7%	3.4%
Home Health Agency	11	11	1.2%	1.2%
Hospital	287	279	30.6%	30.5%
Law Firm	11	11	1.2%	1.2%
Medical Group or Specialty Practice	26	23	2.8%	2.5%
Other Non Clinical	76	88	8.1%	9.6%
Other Provider	17	18	1.8%	2.0%
Physician Prac Mgmt Group	10	9	1.1%	1.0%
Prof Trade Assoc	3	4	0.3%	0.4%
Skilled Nursing, Rehab	45	49	4.8%	5.4%
Other	13	9	1.4%	1.0%
<b>Total</b>	<b>937</b>	<b>916</b>	<b>100.0%</b>	<b>100.0%</b>

### MEMBERSHIP BY JOB TITLE

	<i>Members</i>	<i>Members</i>	<i>%</i>	<i>%</i>
<i>Job Title</i>	<i>2004</i>	<i>2003</i>	<i>2004</i>	<i>2003</i>
President/CEO/ Exc. Dir.	60	58	6.4%	6.3%
Partner/Principal/ Owner	57	55	6.1%	6.0%
Other Chief Officer	12	9	1.3%	1.0%
CFO/Controller	153	163	16.3%	17.8%
Vice President	88	82	9.4%	9.0%
Asst/Assoc VP/Admin	22	23	2.3%	2.5%
Director/Manager/ Supervisor	340	334	36.3%	36.5%
Analyst/Accountant	160	149	17.1%	16.3%
Professor/Academic	3	1	0.3%	0.1%
Other Professional	16	24	1.7%	2.6%
Attorney	7	7	0.7%	0.8%
Student	12	8	1.4%	0.9%
Other	7	3	0.7%	0.2%
<b>Total</b>	<b>937</b>	<b>916</b>		

### CERTIFIED MEMBERS

	<i>Members</i>	<i>Members</i>	<i>%</i>	<i>%</i>
<i>Certification</i>	<i>2004</i>	<i>2003</i>	<i>2004</i>	<i>2003</i>
CPA	182	186	19.4%	20.3%
FHFMA	50	51	5.3%	5.6%
CHFP	14	10	1.5%	1.1%

## COMMITTEE CHAIRS 2004-2005

### COMMITTEE

### CHAIR(S)

Audit	Russ Wagner
Awards	Bob DeLuca
Chapter Development	Jean McNeil
Compliance and Internal Audit	Nancy Mandes / Nilufer Shroff
Constitution and Bylaws	Joe Cunningham
Davis Chapter Management System	John Dugan
Decision Support	Sharon Sellman / Regina Truxell
Founders Points	Roger Bjorkquist
Home Health Care	George Pinel
Job Referral	Stephen Nowicki
Legislative	Bob DeLuca/Doug Maier
Liaison	Joe DeMeo
Long-Term Care/CCRC	Sam Arena / Craig Knaup
Membership	Jean McNeil / Joe Curran
Membership Directory	Roger Bjorkquist / Joe Cunningham
Newsletter	D. Johnson/ J. Kellerman/ T. DeLuca
Nominating	Tom Donaghue
Physician Practice Management	Mike Bradley / Andy Fennell / Ray Leichner
Professional Certification	Jonathan Ketcham / Tom Heron
Program and Education	Chris Kops / Tony Scarcelli
Public Relations	Joan Moyer
Reimbursement	Joe Sabatina / Ann Saputelli / Mike Rossi
Revenue Cycle Management	Mike Calder / Frank Smith / Todd Van Meter
Social Activities	Jean McNeil
Web Site	Ann Saputelli / Don Friel / Norm Smith

### AD-HOC COMMITTEE

### CHAIR(S)

Chapter Initiatives Committee	Doug Maier / Frank Smith / Mike Calder/ Kevin McPoyle / Betsy Seeber
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**HFMA  
Metropolitan Philadelphia Chapter  
Income Statement  
FY'05 Budget Vs. FY'04 Actual (As of April 30, 2004)**

	<b>FY 2004 Actual</b>	<b>FY 2005 Budget</b>
<b>Income</b>		
Program Meetings	\$55,614	\$65,000
Reimbursement Meetings	\$12,500	\$15,000
National Dues	\$17,803	\$18,000
Social Committee	\$4,707	\$5,000
Directory Ads	\$2,930	\$5,000
Golf Outing *(2)	\$8,000	\$9,000
Investment Income	\$600	\$800
Miscellaneous Income	\$195	\$500
<b>Total Income</b>	\$102,349	\$118,300
<b>Expenses</b>		
Program Meetings	\$15,913	\$28,000
Directory Printing	\$17,096	\$18,000
Social Committee Meetings	\$15,843	\$10,000
Reimbursement Meetings	\$6,100	\$8,500
Leadership Meetings *(1)	\$13,218	\$17,500
Golf Outing *(3)	\$11,529	\$9,000
Community Expenses	\$0	\$500
Insurance	\$1,770	\$1,800
Awards / Speaker Gifts	\$1,119	\$2,000
Website	\$1,054	\$1,500
Professional Development	\$1,184	\$2,000
Scholarship*(4)	\$2,000	\$2,000
Bank Fees	\$297	\$500
Postage / Mailings	\$7,198	\$8,500
Fax-It Service	\$1,023	\$2,500
HFMA Fellowship Prep Courses	\$0	\$2,000
Miscellaneous	\$0	\$1,500
<b>Total Expenses</b>	\$95,344	\$115,800
<b>Excess</b>	\$7,005	\$2,500

\*(1) includes \$8,000 accrual for Leadership Conference (San Francisco)

\*(2)(3) includes accrual for golf outing

\*(4) includes accrual for \$500 scholarship paid in May

## On the Local Scene...

For updated dates and specifics regarding other local Programs and Events, please visit us on the web at: [www.hfmaphila.org](http://www.hfmaphila.org)

The Revenue Cycle Committee of the Metropolitan Philadelphia Chapter of HFMA is pleased to present its Fall educational program. The program will be held on Wednesday November 17, 2004 at the Holiday Inn at 4th and Arch Sts. in Philadelphia.

The program “Next Practices – Post HIPPA” is designed to provide you insight on effective management techniques of the revenue cycle and legal perspectives on current issues facing hospitals. Our morning session keynote speaker, Gary Borgstede brings us a “Make it Happen” Team Value system that can serve as the foundation for your team to successfully fulfill its vision. After the completion of our morning session, you may have lunch “on your own” at one of the many downtown restaurants.

The second half of our program includes three excellent breakout sessions. Two of these sessions deal with practical issues facing all financial people and their solutions. While the third breakout session is a presentation by an institution that will share the latest results of a current project that they are undertaking. Finally, we will hear from several people in our service area discussing the issues they face with providing charity and uninsured care.

For agenda and registration form visit us on the web at [www.hfmaphila.org](http://www.hfmaphila.org).

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## On the National Scene...

The following represents a list of the events and conferences in the upcoming months that are sponsored by HFMA National.

Please visit [http://www.hfma.org/education/national\\_education\\_calendar.htm](http://www.hfma.org/education/national_education_calendar.htm) for more information on these events.

### **Fall Seminar Series Dates**

December 6-9, 2004 Chicago

### **Audio Webcast Schedule**

Nov. 16, 2004

The Opportunities and Challenges of the New Medicare Advantage Program

Nov. 17, 2004

Consumer Directed Health Plans and Their Implications for Providers

Nov. 18, 2004

Understanding the New Overtime Rules

Nov. 30, 2004

The Final 2005 Rule for the Medicare Hospital Outpatient Prospective Payment System – The Latest Information

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## Notes from National

The November 2004 Notes from National is now available. Please use this link to access your copy: <http://www.hfma.org/NFN/nfn.htm>

Notes from National contains news and updates for HFMA's national, regional and chapter volunteers. The chapter distribution consists of officers, directors, and key committee chairs. This month's issue contains the following contents:

- Volunteer leaders exchange ideas during Fall Presidents Meetings
- Cost of a Chapter Advancement Team consult is a phone call, benefits are priceless
- Membership Directory requirement due November 10
- Chapters improve web sites to enhance member services
- How to plan and educational program
- Humor Rx for HFMA volunteers
- Conference Planning Checklist
- Regional executive focus
- Find tools, techniques, and approaches at HFMA's 2004 Fall Seminar Series in Chicago
- Resources for strategic planning
- Calendar
- Conference call services available; rates reduced

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## HFMA Presents A Longwood Gardens Christmas 2004

See towering Christmas trees and over 2,000 poinsettia plants transform the indoor gardens into a winter wonderland. Outdoors, see over 400,000 lights and at night a colorful fountain display set to music. Organ sing-a-longs and choral, harp and bell concerts add to the holiday celebration.



Ticket prices are unbelievable! The HFMA rates are, for ages 20 and under – FREE – and for ages 20 and over, only \$10 each. The limit per order is 10. Tickets are good for 1 year from purchase. The Christmas display runs from November 25, 2004 through January 2, 2005.

The deadline for ticket purchase is November 19. Please fill out the section below and mail check payable to HFMA to:

Angelo Savelloni  
Main Line Health Inc.  
950 Haverford Road Suite 110  
Bryn Mawr, Pa 19010  
610-526-8840 Fax 610-526-8845

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Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone # \_\_\_\_\_ Fax # \_\_\_\_\_ E-Mail \_\_\_\_\_

Children 6 to 20 \_\_\_\_\_ x free  
(children under 6 do not need a ticket)

Ages 20 and up \_\_\_\_\_ x \$10 \_\_\_\_\_

Tickets will be mailed by 11/22/04.