



Pennsylvania Coalition of Affiliated
Healthcare & Living Communities

2024 FALL SUMMIT



September 15th - 17th
Hotel Gettysburg

Important Updates & Reminders

WELCOME TO PACAH'S 2024 FALL SUMMIT

Thank you for joining us for PACAH's 2024 Fall Summit. This insert contains important information regarding the conference schedule and line-up of events

HEALTH & SAFETY As an affiliate of the County Commissioners Association of Pennsylvania (CCAP), PACAH continues to consider the safety of all attendees.

We monitor the environment surrounding health and safety and information surrounding the need for pre-screening and safety protocols when they arise.

HANDOUTS All educational session presentations and handouts received by PACAH ahead of time have been made available on the PACAH website on the PACAH 2024 Fall Summit page. We will continue to add handouts to the website as they are made available.

EDUCATIONAL CREDITS Certificate of attendance retrieval information will be distributed via email in October. NAB/Ncers CEUs will be uploaded to the registry per NAB/Ncers guidelines.

All educational credits will be electronically tracked with barcode scanners. You will see a barcode located at the bottom of your name badge. Please look for PACAH board or staff members that are holding barcode scanners as you enter and exit session rooms. In order to accurately track your session attendance, you are required to have your barcode scanned prior to all sessions as well as after each session ends.

Failure to have your barcode scanned both prior to and after sessions will result in inaccurate session tracking and the risk the loss of credit hours earned.

In order to receive CE certificates from any NCERS approved provider, you must be registered on NAB's CE Registry.

EDUCATIONAL CREDIT APPROVAL

This program has been approved for Continuing Education for 8 total participant hours by NAB/NCERS:

In-Person Approval - 20250914-8-A106015-IN

Distance Learning Approval - 20250915-8-A106051-DL

PACAH is an approved provider through the Department of Human Services Bureau of Human Services Licensing. Total CEUs available: 3

This program offers 8 credit hours fulfilling the requirements of the Pennsylvania State Board of Nursing.

PACAH is registered with the Pennsylvania State Board of Accountancy and is approved for 3 total credit hours.

PACAH, the sponsor program for the 2024 Fall Summit in Gettysburg, PA, has been approved by the PA CLE Board for 3.00 substantive IN-PERSON credits.

EVALUATIONS Online evaluation forms will be sent via email post-conference. Please take a moment to complete this evaluation. Accredited continuing education organizations require a completed evaluation. These evaluations also help PACAH improve our conference process and educational sessions.

HOTEL INFORMATION For those who are spending the night at the hotel, check-in is at 4 p.m. and check-out is at 11 a.m. If you need early check-in or late check-out, please contact the hotel.

The Hotel Gettysburg is pleased to provide complimentary WI-FI access during your visit. This is an unsecure public network.

WI-FI NETWORK: Hotel Gettysburg
PASSWORD: 1797

2024 FALL SUMMIT SPONSORS



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AGENDA AT A GLANCE

SUNDAY, SEPTEMBER 15TH

4 - 6 p.m. Ballroom Lobby Registration & Welcome Reception

MONDAY, SEPTEMBER 16TH

8:30 a.m. - 3:30 p.m. Ballroom Lobby Registration

8:30 - 9:30 a.m. Grand Ballroom Breakfast

8 - 9:15 a.m. Stevens Room PACAH Board Meeting (private)

9:30 - 10:30 a.m. Grand Ballroom Transparency Issues for Long Term Care Providers

10:45 - 11:45 a.m. Grand Ballroom The New Overtime Rule: Avoiding Investigation and Misclassification

noon - 1 p.m. Grand Ballroom Lunch

1:15 - 2:15 p.m. Grand Ballroom Senior Living Industry Update and Strategic Planning Discussion

2:15 - 3:15 p.m. Grand Ballroom Afternoon Break

2:30 - 3:30 p.m. Grand Ballroom The PBJ and Finance's Role in a Successful Survey

4 - 5:30 p.m. Grand Ballroom Happy Hour & Trivia

TUESDAY, SEPTEMBER 17

8 - 11:30 a.m. Ballroom Lobby Registration

8 - 9 a.m. Grand Ballroom Working Breakfast

8 - 9 a.m. Grand Ballroom Empowering Administrators and CFO's: Leveraging Social Determinants for Stronger Hospital Partnerships in the Post-Acute Space

9:15 - 10:15 a.m. Grand Ballroom Pennsylvania Emergency Preparedness

10:30 - 11:30 a.m. Grand Ballroom A Dose of Immunization Information

11:45 a.m. - 12:45 p.m. Grand Ballroom Working Lunch

11:45 a.m. - 12:45 p.m. Grand Ballroom OSHA Regulatory Compliance and Responding to an OSHA Survey



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Healthcare & Living Communities

2024 FALL SUMMIT AGENDA

SUNDAY, SEPTEMBER 15TH

REGISTRATION & WELCOME RECEPTION

4 - 6 p.m.

Grand Ballroom Lobby

MONDAY, SEPTEMBER 16TH

REGISTRATION

8:30 - 3:30 p.m.

Grand Ballroom Lobby

PACAH BOARD MEETING (PRIVATE)

8 - 9:15 a.m.

Stevens Room

BREAKFAST

8:30 - 9:30 a.m.

Grand Ballroom

TRANSPARENCY ISSUES FOR LONG TERM CARE PROVIDERS

9:30 - 10:30 a.m.

Grand Ballroom

NHA – 1

RN – 1

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.*

THE NEW OVERTIME RULE: AVOIDING INVESTIGATION AND MISCLASSIFICATION

10:45 - 11:45 a.m.

Grand Ballroom

NHA – 1

PC - 1

RN – 1

CLE - 1 substantive

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.*

LUNCH

noon - 1 p.m.

Grand Ballroom

SENIOR LIVING INDUSTRY UPDATE AND STRATEGIC PLANNING DISCUSSION

1:15 - 2:15 p.m.

Grand Ballroom

NHA – 1

RN – 1

CPE - 1

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, provide industry updates, and future outlooks on the industry. In addition to giving an industry outlook, we will be discussing strategic planning, lifecycle stages and assessments on how to execute a strategic plan. The role of management and the board of directors will be discussed. Real time situations will be discussed as to what Baker Tilly is seeing with its internal client base. In addition, Baker Tilly would like to open the floor up to discussion and see how the those in attendance are addressing strategic planning. We will also be discussing how to minimize risk through compliance requirements, review status of the CMS 5 Claim SNF Probe and Educate audits, share insights on Payroll-Based Journal (PBJ) audits.

Session Learning Objectives:

- Discuss current developments and trends within the industry.
- Discuss the strategic planning process and the stages and assessments steps to be successful in that process.
- Discuss simple steps to minimize organizational risk by understanding compliance requirements.

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

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

AFTERNOON BREAK

2:15 - 3:15 P.M.

Grand Ballroom

THE PBJ AND FINANCE'S ROLE IN A SUCCESSFUL SURVEY

2:30 - 3:30 p.m.

Grand Ballroom

NHA – 1

RN – 1

CPE -1

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.*

HAPPY HOUR/TRIVIA

4 - 5:30 p.m.

Grand Ballroom

TUESDAY, SEPTEMBER 17TH

REGISTRATION

8 - 11:30 a.m.

Grand Ballroom Lobby

WORKING BREAKFAST

8 - 9 a.m.

Grand Ballroom

EMPOWERING ADMINISTRATORS AND CFOS: LEVERAGING SOCIAL DETERMINANTS FOR STRONGER HOSPITAL PARTNERSHIPS IN THE POST-ACUTE SPACE

8 - 9 a.m.

Grand Ballroom

NHA – 1

RN – 1

CPE - 1

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*

PENNSYLVANIA EMERGENCY PREPAREDNESS

9:15 - 10:15 a.m.

Grand Ballroom

NHA – 1

PC -1

RN – 1

CLE - 1 substantive



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 Departments ten most identified threats the course will identify those risks and preparations for those potential emergencies.

*Thomas Micozzie, Owner
Project Development Resources*

A DOSE OF IMMUNIZATION INFORMATION

10:30 - 11:30 a.m.

Grand Ballroom

NHA – 1

PC - 1

RN – 1



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*

WORKING LUNCH

11:45 a.m. - 12:45 p.m.

Grand Ballroom

OSHA REGULATORY COMPLIANCE AND RESPONDING TO AN OSHA SURVEY

11:45 a.m. - 12:45 a.m.

Grand Ballroom

NHA – 1

RN – 1

CLE - 1 substantive



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*



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