



**hfma**™ southwestern ohio chapter  
healthcare financial management association

# Southwest Winds



<http://www.swohfma.org>

Spring 2015 Volume 32/Number 4

## The May Institute Is Coming

Join us on May 14 and 15 for the Chapter’s premier event, the May Institute, a 2-day education/networking event at the Marriott in West Chester. Amazon bestselling author and top-rated speaker, Dr. Jerry Teplitz, will lead off with a seminar providing a method for personal brain re-engineering to quickly and successfully adapt to a changing environment. This is followed by the following breakout sessions:

- Speeding to Effective Time Mastery Working Smarter Not Harder
- The New Era of Healthcare Collaboration
- How Bundled Payments Fit Into a Broader Population Health Model
- Effective and Efficient Implementation of Section 501(r) – Having a Game Plan to Tackle the Final Regulations
- “Balance, Daniel-san”: Developing a Cohesive Quality & Financial Strategy
- New Ways to Think About Practice Productivity

Thursday concludes with a Happy Hour. Enjoy this opportunity to network with fellow attendees while enjoying your favorite beverage.

Friday starts with a CFO panel moderated by Todd Cole. The CFO Panel includes senior finance executives from the region and will offer insight into the challenges and opportunities faced by healthcare systems and providers. Adequate time will be allowed so that attendees may ask questions of the panel.

Following the CFO panel, Ryan Biles, Senior Vice President, Health Economics & Policy, OHA, will present Hospitals and the 2016-17 Ohio State Budget including the following:

- Changes in Medicaid
- Changes to the franchise fee
- Maintaining Medicaid eligibility and a look at the first year’s impact



Dr. Jerry Teplitz

On Friday afternoon, The Art of Entertaining is back by popular demand – this year offering a bourbon tasting and cooking demonstration. Enjoy the opportunity to socialize and unwind!

A vendor fair will take place both days during which you can check out the latest products and be eligible to win prizes. Bring your business cards.

The program qualifies for 10.8 CPEs. For more details and registration information, visit our website [www.swohfma.org](http://www.swohfma.org). Hope to see you there!

## Save the Date

The 2015 Biennial Tri-State Fall Institute & Vendor Show is scheduled for September 24-25, 2015, in downtown Cincinnati. This is a joint meeting of the HFMA Central Ohio, Indiana, Kentucky, and Southwestern Ohio Chapters.

In addition to national-level education, several networking events are being planned including golf, Cincinnati Reds game, and trip to the Horseshoe Casino. It is a wonderful educational and networking opportunity with local convenience.

Watch your email or visit our website [www.swohfma.org](http://www.swohfma.org) this summer for program and registration updates. Hope to see you there.

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## President's Message



**I**t is hard to believe the 2014-2015 chapter year is drawing to a close. What a phenomenal opportunity this has been to serve as your Chapter President! I find myself thinking of the individuals I have worked with over the past several years during my leadership tenure, both on and off our Southwestern Ohio Chapter Board, and I am simply honored to have the relationships we have built.

The National HFMA theme for 2014-2015 is "Leading the Change" and there is no better team to address that challenge than this chapter leadership. Our Board of Directors have taken on some tough conversations the last several board meetings, as we tackle industry change head on, and how that has impacted our Southwestern Ohio Chapter of HFMA. I applaud this team with great enthusiasm and pride as I see their focus on membership satisfaction, advancement and education. You will see many improvements to come in the near future, including our major communication areas of our website and newsletters.

I would like to offer a special thank you to so many people within our chapter. **Craig Ganger**, you have done a phenomenal job with programming over the past few years. Congratulations on passing the torch as you take on officer leadership, and thank you to **John P. Mendez** for stepping up to take it, tackling, once again, another job within our chapter. **Andrea Kovall**, this upcoming May Institute will be awesome, and it could not have happened without you! **Carol Tenenholtz** and **Ruth Schwallie**, thank you for stepping up to pull together and review national submissions to give this Board of Directors the recognition they deserve for the hard work they have performed. **Yvonne Focke**, I have never seen board meeting minutes come out so fast and programming events reported so quickly. You have set the bar high! For all the events we have at the various locations, we owe a big thanks to **Joyce Lehmann** for the event site coordination, and **Diana Feldman-Smith** for coordinating each and every registration. And finally, **Renee George** – thank you, for all your support, for everything to help keep me on track and get me through. There are so many more to list, but I want to say a simple thank you to ALL of our volunteers. This chapter does not succeed without you!

As things begin to wind down for this leadership team, we have only just begun to gear up for our 2015-2016 successes. Looking to the new chapter fiscal year, beginning June 1, 2015, I am excited to announce our new board has been approved by our voting members. This team, led by **Renee George**, has already tackled some planning and preparation for the upcoming year, and I have to say, I am quite excited! The ball is rolling as seven of our key leaders approach the upcoming Leadership Training Conference with open minds and enthusiasm to gain some fresh perspective. I would encourage each of you to take part in what is to come! Please reach out to any of our leadership team listed in this newsletter to become more involved. Opportunity is right around the corner with our upcoming chapter planning in June, open to all members. I hope many of you can join us for our upcoming May Institute, as I enjoy my last hoorah as your Chapter President, and all of us join in celebrating and welcoming our upcoming chapter leadership. I hope to see YOU on May 14th and 15th!

**Danielle Kraatz**  
Chapter President  
2014-2015

### 2014 – 15 Officers

President  
**Danielle Kraatz**  
UC Health  
(513) 585-8071 [danielle.kraatz@uchealth.com](mailto:danielle.kraatz@uchealth.com)

Past-President  
**David McCullough**  
Professional Medical Services  
(817) 451-0015 [dmccullough@p-m-s.com](mailto:dmccullough@p-m-s.com)

President-Elect  
**Renee George**  
Premier Health Partners  
(937) 499-9887 [rpgeorge@premierhealthpartners.org](mailto:rpgeorge@premierhealthpartners.org)

Vice-President  
**Andrea Kovall**  
Consolidated Health Services/CHI National Home Care  
(513) 576-0262 [andrea.kovall@chs.trihealth.com](mailto:andrea.kovall@chs.trihealth.com)

Secretary  
**Yvonne Focke**  
Advanced Patient Solutions, LLC  
(513) 673-3995 [yfocke@cinci.rr.com](mailto:yfocke@cinci.rr.com)

Treasurer  
**Karen Shadowens**  
UC Health West Chester Hospital  
(513) 298-7707 [karen.shadowens@uchealth.com](mailto:karen.shadowens@uchealth.com)

### 2014 – 15 Directors

**Amy Becker**  
Fifth Third Bank  
(937) 227-3003 [amy.becker@53.com](mailto:amy.becker@53.com)

**Craig Ganger**  
Premier Health  
(937) 499-5517 [caganger@premierhealth.com](mailto:caganger@premierhealth.com)

**Brian Krause**  
TriHealth, Inc.  
(513) 569-5126 [brian\\_krause@trihealth.com](mailto:brian_krause@trihealth.com)

**Joyce Lehmann**  
Medical Recovery Systems, Inc.  
(513) 487-7316 [jlehmann@medicalrecovery.net](mailto:jlehmann@medicalrecovery.net)

**John Mendez**  
Mercy Health  
(513) 639-0143 [johnpmendez@mercy.com](mailto:johnpmendez@mercy.com)

**Robert Shoemaker**  
The Christ Hospital Health Network  
(513) 263-1688 [robert.shoemaker@thechristhospital.com](mailto:robert.shoemaker@thechristhospital.com)

**Kristen Sumpter**  
Robert Half International  
(513) 621-4243 [kristen.sumpter@rhi.com](mailto:kristen.sumpter@rhi.com)

**Carol Tenenholtz**  
Carol Tenenholtz, Inc.  
(513) 520-9879 [csteneholtz@fuse.net](mailto:csteneholtz@fuse.net)

## April 10, 2015 Board Meeting Highlights

- The Chapter Balance Scorecard and DCMS Reports were reviewed including key measures and year-to-date status on the Chapter's metrics. We are falling short in three areas: membership count, programming hours, and certification. Opportunities to meet the goals by April 30, 2015 were discussed.
- The current membership count is 384 vs. a target of 422. This is largely a reflection of the economic times. Membership scholarships are still available or eligible candidates.
- Programming will be a focus at the LTC. Format changes will be discussed.
- As of April 10, 2015, the Chapter has a \$15,778 operating deficit; the FY15 budget is an \$8,430 deficit. Several sponsorships are in process. The cash balance was \$83,615.
- Chapter leaders will be attending the National Leadership Training Conference (LTC) in San Antonio on April 26-28, 2015. A mini-LTC will be held for members interested in getting involved in the Chapter in June.
- Other committee updates were given.

### New and Transferred Members

**Teresa H. Acherman**, Chargemaster  
Manager, Compliance, Parallon

**Charles Arenas**, Senior Vice President,  
Healthcare Payments, KeyBank

**Amanda Carson-Spychalski**, Senior  
Accountant, Wright State Physicians

**Bridgette Dorsel**, Account Manager,  
ProLink Healthcare

**Jamie Eshbaugh**, Senior Accountant,  
Wayne HealthCare

**Eric Hubbard**, Financial Analyst,  
Cincinnati Children's Hospital Medical  
Center

**Sara W. Hutchinson**, FrameWorkMI, Inc.

**Karen Levering**, Director, Patient Access,  
St. Elizabeth Healthcare

**Josh Martin**, Market President, Evolent  
Health

**Renee L. Mock**, VP Finance, Fidelity  
Health Care – Premier Health

**Deidra Wells**, Business Mgr – PT Care,  
Kettering Health Network

**Jeff Wells**, Midmark

### HFMA Membership Milestones

#### 35 Years

**David Boyer**, Mercy Health Partners

#### 30 Years

**Akil Sharif**, Day-Mont Behavioral Health Care, Inc.  
**Russell Wetherell**, Southview Hospital  
**Douglas Wickerham**, Catholic Health Initiatives

#### 25 Years

**Annie Grant**, UC Health

#### 20 Years

**Diana Feldman-Smith**, Retired

#### 10 Years

**Andrew Banks**, Dbs Healthcare Consulting  
**Jerry Kershner**, WellPoint, Inc.  
**David McCullough**, Professional Medical Services  
**Beverly Rehtin**, TriHealth, Inc.  
**Joseph Thamann**, St. Elizabeth Health Care  
**Robin Wilson**, Mercy Health

#### 5 Years

**Charlotte Cammack**, Dayton Children's Hospital  
**Rita Davis**, Dayton Children's Hospital  
**Wesley Ernst**, BKD, LLP  
**Darlene Flanigan**, Dayton Children's Hospital  
**Joseph Lyren**, St. Elizabeth Med Center - South  
**Carl Swart**, Mercy Health  
**Margaret Wierenga**, TriHealth, Inc.

(Based on February, March, and April  
membership start dates)

### We want you!

Mini Leadership Training Conference for SWO HFMA will be held at Atrium Medical Center on June 12th from 8:30am-3:00pm. A light breakfast and lunch will be served.

Join this session to participate in planning for YOUR HFMA chapter. Take action and help shape the direction of the chapter in this fast paced working session. Each of the chapter committees will be laying out goals for the 2015-2016 chapter year and we want your input. If you would like to join one of the committees listed below or are simply curious about how the chapter functions, this is the event for you. Participation earns you credit towards chapter awards status and contributes to ongoing certification requirements.

## Chapter Elections and Annual Meeting

The Chapter elections and annual meeting were held on Friday, February 13, 2015 at the Wingate by Wyndham in West Chester. The following slate of officers and directors as well as an amendment to our Chapter Bylaws were approved:

- President–Elect - **Andrea Kovall**, Director - Managed Care, Consolidated Health Services
- Vice-President - **Craig Ganger**, Director – Managed Care & Decision Support, Premier Health
- Treasurer – **Karen Shadowens**, Director of Finance/CFO, UC Health West Chester Hospital
- Secretary – **Yvonne Focke**, Principal, Advanced Patient Solutions
- Director – **Brian Blank**, Senior Contract Analyst, TriHealth, Inc.
- Director – **Brian Krause**, Vice President – Finance, TriHealth, Inc.
- Director – **Amy Becker**, Corporate Finance Healthcare and Professional Services, Fifth Third Bank
- Director – **Tashawna Thomas-Otabil**, Provider Contracting & Administration, UnitedHealth Group

They will join incoming president, **Renee George**, and continuing directors, **Joyce Lehmann**, **John Mendez**, **Rob Shoemaker**, and **Kristen Sumpter**, in leading the Southwestern Ohio Chapter of HFMA during FY16, which begins June 1, 2015.

Congratulations to Renee and her team. Please contact one of them to get more involved. They have already started the planning process for what looks to be a very interesting and exciting year.

## Southwestern Ohio Chapter HFMA 2014-15 Committee Listing

<u>Committee</u>	<u>Chairperson</u>	<u>Email</u>	<u>Co-Chairperson</u>	<u>Email</u>
Awards Dinner	Joyce Lehmann	jlehmann@medicalrecovery.net		
Certification	Dave McAdams	dmcadams@southcommunity.com		
Davis Chapter Mgt.	Yvonne Focke	yfocke@cinci.rr.com		
Founders Merit	Yvonne Focke	yfocke@cinci.rr.com		
IT (Webmaster)	John Mendez	johnpmendez@mercy.com		
May Institute	Andrea Kovall	andrea.kovall@chs.trihealth.com		
Link	Michele Napier	mnapier@mercy.com		
Member Outreach	Diana Feldman-Smith	dfeldmansmith@cinti.rr.com	Chris Lah	chris.lah@cchmc.org
Membership	David Gaffey	djgaffey@mercy.com	David Gaffey	amy.becker@53.com
Newsletter	Robert Shoemaker	robert.shoemaker@thechristhospital.com	Ruth Schwallie	ruth_schwallie@fuse.net
Past President's Council	Shawn Kent	sakent@mercy.com		
Program	Craig Ganger	caganger@premierhealth.com	Brian Blank	brian_blank@trihealth.com
Social Events	Amanda Fishman	afishman@theclarogroup.com	John Mendez	johnpmendez@mercy.com
Sponsorship	Kristen Sumpter	kristen.sumpter@rhi.com	John Mendez	johnpmendez@mercy.com
Yerger	Carol Tenenholtz	cstenenholtz@fuse.net		

## New Member Spotlight – Karen Levering



I am originally from Eastern Kentucky, but spent the majority of my healthcare career in Central Ohio, most recently moving to Cincinnati in July, 2013.

I began my Patient Access career as a night shift registrar in the emergency room in 1997. I have worked in Patient Access since that time as a supervisor, manager, and director. I spent 7 years at the Mount Carmel Health System and 7 years at the Ohio Health system. My responsibilities included directing all aspects of registration, insurance verification, pre-registration, and financial counseling.

In 2011, I took a position with Medassist and worked in California for 2 years. I then took a position as Director of Patient Access Services for St. Elizabeth Healthcare in Northern Kentucky where I am responsible for all areas of Patient Access.

I absolutely love Patient Access and the ability to positively impact the patient experience at the very beginning of their encounter with our health system.

I have been married for 25 years and have 3 children, ages 21, 18, and 16. I spend most of my free time at the soccer field watching my youngest play. In my remaining free time, I enjoy shopping with my husband. I joined the HFMA to be able to network with other revenue cycle professionals, and stay updated on the continually changing healthcare field.

## Member News

- **Adhrain Griffith** has been promoted to Finance Manager for TriHealth Physician Partners.
- **Danielle Kraatz** has joined UC Health as System Director, Government Reimbursement.
- **Matthew Nienaber** is the new Assistant Director of Patient Financial Services at Ohio State Wexner Medical Center in Columbus.
- **Don Peak** has resigned his position as Director of Operations – Finance at UC health to devote more time to his consulting firm, DJ Peak Consulting, Inc.

Congratulations and best wishes to all!

## Member Outreach Update

Our next event will be to take children from an inner city school to a Reds game. We are able to do this through the generosity of Cincinnati Bell Technology Services, who provides the tickets. This outing is scheduled for May 27, 2015 at 12:35 as the Reds take on the Colorado Rockies.

The committee is also planning a lunch event at the Ronald McDonald House this summer. It involves providing and serving lunch to the guests and staff. The date and time are to be determined.

Watch your email for more details. If you would like to participate, contact Chris Lah at [chris.lah@cchmc.org](mailto:chris.lah@cchmc.org).

## We Want You!

A Mini Leadership Training Conference (LTC) for SWO HFMA will be held at Atrium Medical Center on June 12<sup>th</sup> from 8:30am-3:00pm. A light breakfast and lunch will be served.

Join this session to participate in planning for YOUR HFMA chapter. Take action and help shape the direction of the chapter in this fast paced working session. Each of the chapter committees will be laying out goals for the 2015-2016 chapter year and we want your input. If you would like to join one of the committees listed below or are simply curious about how the chapter functions, this is the event for you. Participation earns you credit towards chapter awards status and contributes to ongoing certification requirements.

Committees  
 Awards Dinner  
 Certification  
 IT (Webmaster)  
 May Institute  
 Member Outreach  
 Membership  
 Newsletter  
 Past President's Council  
 Program  
 Social Events  
 Sponsorship  
 Yerger

## Stay Connected

The Chapter now has an email address: [hfma@swohfma.org](mailto:hfma@swohfma.org). You should be receiving a weekly email on Wednesdays from this address with all the latest Chapter news. If you are not receiving it, please contact Danielle Kraatz at [dakraatz@mercy.com](mailto:dakraatz@mercy.com). Please make sure this address is in your approved list so you don't miss out.

Don't forget that the Chapter has a website. For all the latest news, contacts to HFMA members, and upcoming educational offerings, check our website – [www.swohfma.org](http://www.swohfma.org).

## Save the Date – Reds Game

Mark your calendar for Thursday, August 6, 2015, and plan to join us for a fun afternoon on the outfield pavilion at Great American Ball Park as the Cincinnati Reds take on the St. Louis Cardinals. Watch your email for details on how to get tickets. Don't be left out!



## February Forum

The 2015 Winter Education Day was held on February 13, 2015 at the Wingate by Wyndham in West Chester. The speakers and topics were as follows:

- Mark Schabel & Randy Tempest from Receivables Management Partners on Leading Your Team to Success
- Charles Cataline from OHA updating us on Federal, State and other industry matters
- KPMG's Kimberly Scaccia and Christine Sullivan on Improving Revenue Cycle Outcomes
- Lori Judge from Dayton-Children's and Bill Ayres with Divergent on "Do You Know How Your Chargemaster REALLY Works in Your Hospital?"

The Chapter Annual Meeting was also held at which a Chapter Bylaws amendment and slate of officers and directors for 2015-16 were approved (see separate article).



## March Madness

The 6<sup>th</sup> Annual March Madness Event was held on Friday, March 20, 2015, in the upstairs party room at O'Bryon's Irish Pub. All attendees enjoyed the food, drink, and friendship of fellow HFMA members, and many walked away winners of the various contests and door prize drawings. Many thanks to **Michele Wall** and **Jessica Cotter** for hosting this event.



## HFMA Membership Scholarships Available Sponsored by: ClearBalance

As environments in our hospitals, physician offices, skilled nursing facilities, vendor relationships and so much more go through the winds of change, we must all adapt our approach to situations to result in successful outcomes. We are all being asked to do more with fewer resources, and professional development is no exception to the rule. As providers cut back on their coverage of HFMA memberships for their employees, our chapter is tackling the issue head on by presenting provider employees with an opportunity to earn a membership scholarship for our chapter.

Please complete the form below if you, or a member of your provider organization is interested in applying. I encourage you to share this with your coworkers who could benefit from what HFMA has to offer. Please note, there are qualifying items, listed at the bottom of this application. **Once completed, please submit the application to Danielle Kraatz at [Danielle.Kraatz@UCHealth.com](mailto:Danielle.Kraatz@UCHealth.com), or 513-585-8071.**

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

Date: \_\_\_\_\_

Title : \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Provider Organization: \_\_\_\_\_

HFMA Member Sponsor: \_\_\_\_\_

Please check the appropriate boxes below:

YES NO

I hereby certify my provider organization does not offer to pay for HFMA membership at my employment level within the organization.

I agree to obtain 20 hours of education via webinars or local education sessions for the Southwestern Ohio HFMA chapter by March 15, 2016.

### Qualifications to Apply for Scholarship

- Applicant must work for a provider.
- Provider must not offer to pay for HFMA membership at your employment level within the organization.
- Scholarship recipient must commit to obtaining 20 hours of education via webinars or attendance of local education sessions by March 15, 2016. If this is not met, the scholarship will not be renewed in subsequent years.
- The scholarship recipient must be nominated by a current member within their provider organization.

Applicants Signature: \_\_\_\_\_

Date: \_\_\_\_\_

HFMA Member Sponsor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Thank you again to **ClearBalance** for providing the scholarship funds to make this possible!

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**Upcoming Webinars – FREE for Members**  
**Mark Your Calendar!**  
**Upcoming Live Webinars offered by HFMA National**  
**Contact for these events is Renee George at [rpgeorge@mvh.org](mailto:rpgeorge@mvh.org)**

FREE for Members  
 Earn 1.5 CPEs per Webinar!

Other webinars available  
Check registration and cost information at [www.hfma.org](http://www.hfma.org)

HFMA provides webinars available one calendar year following the live webinar date and year. Most on-demand webinars are free for HFMA members and \$99 for non-members, unless otherwise noted.

- May 11 Understanding HFMA's Newly Redesigned Certified Healthcare Financial Professional (CHFP) Program
- May 12 Balancing Clinical and Financial Concerns: Insights on CMO-CFO Collaboration
- May 13 Reigning in Labor Costs Using Predictive Analytics and Data Transparency
- May 14 Fostering Provider-Payer Collaboration to Improve Chronic Care Management in Accountable Care Organizations
- May 19 Creating Revenue Integrity Strategies for the Future
- May 20 Strategies to Ensure Compliance With IRS-501(R) and its Impact on Patient Responsibility Workflows
- May 21 How Memorial Hermann Health System Improved Patient Satisfaction and Collection Rates While Reducing Costs
- May 26 Reducing Value-Based Purchasing Penalties by Improving Clinical Documentation
- May 27 A Cross-Organizational Approach to Costing, Performance Measurement, Decision Support, and Analytics
- June 3 A 360-Degree Perspective on Best Practices for ICD-10 Readiness
- June 4 Minimizing ICD-10's Impact on a Physician Practice's Revenue Cycle
- June 16 How Overtime May be Harming Your Business and Patients

### Job Opportunities

**Job title:** Senior Financial Analyst  
**Location:** UC Health Business Center, 3200 Burnet Ave., Cincinnati, OH 45229  
**Department:** System Operations Finance & Strategic Finance  
**Shift:** Full-time/Exempt

**Description:**  
 Position will provide analytic support to System Operations and Strategic Finance department. The position will have dual reporting to the Director, Strategic Finance and Manager, Budget and Performance. Primary areas of focus will include analytics supporting the development of both capital and operating system wide budgets and productivity analysis. Also, the position will provide strategic finance support which includes pro-forma and business plan development related to system-wide strategic initiatives, valuation and strategic return analysis along with providing support to the system's strategic investment review process efforts.

**Education:** Bachelor's degree required. Accounting or Finance major preferred.

**Years of Experience:** 1-2 years' related experience required. 3 years' related experience preferred.

**Required Skills and Knowledge:** Proficiency with Microsoft Excel and experience in budget planning, capital return and pro forma development including investment return analysis. Advanced analytic skills and/or experience. Strong soft skills, including communication.

**Apply to:** [www.uchealth.com/careers](http://www.uchealth.com/careers) and search for Job Number: 031064



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Robert Shoemaker, Editor  
The Christ Hospital  
6Observatory Hill  
Cincinnati, Ohio 45208

hfma 2014 - 2015

**FIRST CLASS MAIL**

***HFMA Southwestern Ohio Chapter  
Southwest Winds***

**Newsletter Committee**

Chair – Robert Shoemaker  
robert.shoemaker@thechristhospital.com

Co-Chair – Ruth Schwallie  
ruth\_schwallie@fuse.net

Brian Blank	Danielle Kraatz
Julie Burks	Jeff Ladenburger
Craig Ganger	John Mendez
Pete King	Jan Wooles

**Editorial Policy**

The statements and opinions appearing in articles are those of the authors and not necessarily those of the Southwestern Ohio HFMA Chapter, or the editor. The editor reserves the right to edit material and accept or reject contributions whether solicited or not. All correspondence is assumed to be a release for publication unless otherwise indicated.

**Article Submission**

*Southwest Winds* encourages submission of material for publication. Articles should be typewritten and submitted electronically to the editor by the deadlines listed below. The editor reserves the right to edit, accept, or reject materials whether solicited or not. HFMA Founder Points are granted for any articles published in *Southwest Winds*.

**Chapter Corporate Sponsors**

The Southwestern Ohio Chapter of HFMA would like to acknowledge and thank the following corporate sponsors. Your financial support and technical assistance is very important and is greatly appreciated by our membership!!

**Platinum Level:**

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