



**ASOA**  
**ANNUAL MEETING**  
In conjunction with ASCRS

APRIL 5–8, 2024 | BOSTON, MA

**Saturday, April 6**

**11:00 a.m.– 12:00 p.m.**

## **Practice Management Courses**

### **A6-301 Managing Emotions in the Workplace**

ASOA Leadership and Strategic Management

Experienced

#### **Course Description**

This course will discuss how emotions play a crucial role in the workplace, influencing our interactions, decision-making, and overall job satisfaction. Effective emotional management is essential for both individual and organizational success. This course is designed to help participants develop the skills and strategies needed to navigate the complex landscape of emotions in the workplace. Through a combination of theoretical knowledge, practical exercises, and real-world examples, participants will gain a deeper understanding of emotions and learn how to harness them for personal and professional growth.

**Instructor(s):** Savory Turman, MS, COMT, COE, OCS; Laura Baldwin, RN, SHRM-CP

### **A6-302 How to Grow When Medicare Keeps Cutting**

ASOA Business Operations

Mid-Level

#### **Course Description**

The experienced panel will lead a discussion of various strategies for business development and enhancing profitability in an era of continuing cuts from insurers. Discussion topics will focus on the following three areas: 1) Implementing Operational/Efficiency improvements 2) Creating new opportunities / strategic initiatives 3) Identifying Resources – no need to reinvent the wheel.

**Instructor(s):** Carrie Jacobs, COE; Patti Barkey, BA, COE; Maureen L. Waddle, MBA

### **A6-303 The Patient Said What?: How to Respond and Make Changes to Patient Feedback**

ASOA Marketing and Business Development

Introductory

#### **Course Description**

This course will cover change implementation for patient experience surveys or feedback methods for your practice. We will share our entire journey of patient experience feedback, from taking no action - to the rollout of a new patient survey and being flooded with feedback (which wasn't always very good!). Explain our decision making strategy for taking action from patient feedback; hiring a Patient Experience Analyst, writing policies regarding the handling of patient complaints, and building a repository of all patient complaints and concerns to help the practice track each issue and follow up with each patient.

**Instructor(s):** Abigail K Jackson, DNP, RN; Dana R Bair, BA, CPSS



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**A6-304 Compliance Headaches with Cataract Surgery**

ASOA Risk Management and Compliance

Experienced

**Course Description**

According to Medicare and our professional societies, a high percentage of cataract surgeries are not adequately supported in the medical record, particularly for the second eye. This leads to accusations of overpayment. This course identifies the many problems in detail, it provides attendees with a practical checklist to avoid the problems as prescribed by a Medicare Administrative Contractor, and offers an opportunity to learn from an expert panel that helps clients navigate postpayment scrutiny. Case studies are used for illustration.

**Instructor(s):** Allison Shuren, MSN, JD; John McInnes, MD, JD; Kevin J. Corcoran, BSc, COE, CPC, CPMA

**A6-305 Create a Culture of Personal Accountability Among Your Staff to Increase Productivity and Eliminate Drama**

ASOA Human Resources

Mid-Level

**Course Description**

Practices strive to achieve a culture where operations are efficient and the best clinical care is provided but staff distractions and bad culture often disrupt these goals. A consistent, positive culture of accountability and shared values can improve the productivity and outcomes in our day to day operations.

**Instructor(s):** Dixon Davis, MBA, MHSA, CMPE

**A6-306 Why All Clinical Staff Should Understand Coding**

ASOA Coding and Billing

Introductory

**Course Description**

This course will review basic coding and how it applies to practice administrators, technicians, and scribes. Instructors will present common auditing errors and how this relates to the exam and work up. Instructors will review how to incorporate basic coding principles into a scribe and technician training program.

**Instructor(s):** Brenea Facchini, BSc, COMT, CPC, OSC; Mary Pat Johnson, COMT, COE, CPC, CPMA



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## **Practice Management Courses**

### **A6-401 Straight A's – Excelling in Clinical Care, Patient Experience, Business Reputation**

ASOA Leadership and Strategic Management

Introductory

#### **Course Description**

Long lasting impressions may trump first impressions. You create lasting impressions by excelling in clinical care, creating a positive patient experience, and maintaining a sound business reputation beyond reproach. This course describes how to do so. The instructors provide various perspectives: a practice administrator, a clinical director, and a consultant.

**Instructor(s):** Bansari Mehta, MHA; Mary Pat Johnson, COMT, COE, CPC, CPMA

### **A6-402 From Gen Z to the Silent Generation: Creating Harmony in the Workplace**

ASOA Human Resources

Mid-Level

#### **Course Description**

Many administrators are faced with challenges in merging the communication and work styles of multigenerational teams. We will review the characteristics of the five generations that may be working together and will dive into strategies to harness the strengths of each to create a cohesive, diverse, multigenerational team.

**Instructor(s):** Jane T. Shuman, MS, COT, COE, OCS; Myra Cherchio, COMT, COE

### **A6-403 Marketing Strategies to Grow Your Refractive Surgery Practice**

ASOA Marketing and Business Development

Experienced

#### **Course Description**

This course is designed for higher volumes refractive surgery practices (cornea and lens based) committed to spending high dollars amount in marketing each month. We will discuss various forms of media to help refractive surgery practices grow their practice and highlight their success differentiating technologies.

**Instructor(s):** Robert F Melendez, MD, MBA, ABO; Josh `J Melendez, BA

### **A6-404 Become a Leader of Leaders: Developing Your Internal Talent**

ASOA Leadership and Strategic Management

Mid-Level

#### **Course Description**

This course will provide strategies to build your internal team into dynamic leaders. In this panel discussion, we will share ideas to foster a foundation of leadership and engage team members. We will



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discuss the elements needed to be an authentic leader and create powerful, challenging experiences to develop potential.

**Instructor(s):** Janna Mullaney, COE; Patti Barkey, BA, COE; Deborah A. Davis, COE

**A6-405 Administrative Challenges- Jeopardy Style**

ASOA Business Operations

Mid-Level

**Course Description**

The course will take a different approach to answering both common and unique administrative issues, such as co-management and the No Surprises Act. Following the popular game show format, a host will present a series of categories and answers. A panel of experts will formulate the appropriate question followed by a detailed discussion. For example, “I choose regulations for \$400. Answer: Temporarily retaining a physician while the regular provider is on leave. Question: What is a fee-for-time compensation arrangement (aka Locum Tenens Arrangements)?

**Instructor(s):** Linda R. Georgian, COE; Kirk Mack, COE, COMT, CPC, CPMA; Gretchen W. Kimble, JD, COE; Ben Seals, MBA; Thomas T Brown-Spencer, JD, COE

**A6-406 Lean Methodologies to Enhance Ophthalmology Practice Operations**

ASOA Business Operations

Introductory

**Course Description**

In today's rapidly evolving healthcare landscape, ophthalmology practices face unique operational challenges. From patient flow bottlenecks to resource utilization, there are numerous areas where efficiency can be improved. This session introduces participants to the principles of Lean methodology and how they can be applied to ophthalmology practices to drive operational excellence and elevate patient care.

**Instructor(s):** Cornelia Vremes, MBA, Ed.D

**Saturday, April 6**

**2:45 – 3:45 p.m.**

**Practice Management Courses**

**A6-501 Unlocking Your Potential: Mastering Networking, Time Management, and SMART Goals**

ASOA Leadership and Strategic Management

Mid-Level

**Course Description**

This course will unlock your potential on networking, time management, and SMART goals! Dive into the art of building meaningful connections, discover effective strategies to optimize your time, and master the art of setting and achieving SMART goals. Explore topics like effective communication, productivity



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techniques, and goal-setting frameworks. Through interactive exercises and real-life examples, you'll develop crucial skills to excel in both your personal and professional life. Join me on this transformative journey to enhance your networking prowess, maximize productivity, and unlock your full potential!

**Instructor(s):** Brittany N. Williams, COE, COA; Sarah L Duval, BA, COE, COA; Shane Allison, BSc; Fransie Dennee, BSc, COT, OSC

**A6-502 Schedule Optimization and Technician Benchmarking for Workflow Improvement**

ASOA Business Operations

Experienced

**Course Description**

This course will teach you how to optimize your schedule and incorporate technician benchmarking and workflow techniques to achieve a more efficient clinic. You will learn how to analyze your current schedule, create provider production goals, identify potential bottlenecks, and learn to collaborate with your team to make incremental improvements. You will also learn how to monitor and evaluate your progress and adjust your schedule as needed.

**Instructor(s):** Carrie Jacobs, COE; Elizabeth Monroe, MA, CPSS, PHR, COE

**A6-503 Follow This Surgeon's YouTube Channel Success Secrets to Grow Your Patient Base Far Beyond Your City Limits**

ASOA Marketing and Business Development

Introductory

**Course Description**

This course will give attendees a rarely shared 'Behind-The-Scenes' explanation of how one of the most popular ophthalmology YouTubers is using his channel to share real time surgical data, outcomes, lens technology and celebrity patient stories to globally expand his brand and patient acquisition reach. Attendees will learn key development steps to take in building a YouTube channel for their practice and then how to utilize that channel to grow their patient base and revenue streams. Attendees will learn the time requirements of shooting videos, editing videos, deploying current music and graphics to raise the perceived value of their channel. Relevance of content and appropriate topic selection will also be shared.

**Instructor(s):** Michael W. Malley, BA; Shannon M. Wong, MD, ABO

**A6-504 Is My Practice Under Government Scrutiny? Unraveling DOJ False Claims Act Investigations**

ASOA Risk Management and Compliance

Mid-Level

**Course Description**

The Department of Justice announced an unprecedented number of False Claims Act settlements with ophthalmology practices in 2023. This has led to many asking (1) how do we know if you are under investigation, (2) how is a practice targeted, (3) what should I do if I learn my practice is under scrutiny,



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and (4) how do I avoid being a target? This course will unravel the mystery of government investigations, with an emphasis on how to protect a practice.

**Instructor(s):** Allison Shuren, MSN, JD; Loreli Wright, MHA, JD

**Roundtables**

<b>TOPIC</b>	<b>FACILITATOR</b>
Coding & Billing	Kirk Mack, COE, COMT, CPC, CPMA and Brittney Irwin, COT, CPC
Medicare Advantage Plans	Kevin J. Corcoran, BSc, COE, CPC, CPMA
Mergers and Acquisition	Tom Corcoran, CMOM
Return on Investment	Sharon Brown, COE

**Saturday, April 6**

**4:00 – 5:00 p.m.**

**Practice Management Courses**

**A6-601 Perfecting the Cataract Patient Experience**

ASOA Business Operations

Mid-Level

**Course Description**

This course will give you the tools necessary to improve the cataract patient experience starting before the patient first contacts your office and through the post surgical visits. beginning with the pre-visit step through the post operative visits. The patient experience is the sum of all interactions influencing patient perceptions across the continuum of care. Since there are many interactions during the cataract process, it is important to have a solid protocol in place to ensure a positive patient experience.

**Instructor(s):** Deborah A. Davis, COE



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**A6-602 Coaching by the Numbers. Using KPIs as a Roadmap for Training and Development**

ASOA Leadership and Strategic Management

Introductory

**Course Description**

This course will outline how to use data for coaching and keeping ongoing positive communication with your Opticians and Support Staff. Numbers don't lie, but perception does. The data will tell you where training and development are needed and where your staff's perception of their abilities is at. This course will give you guidelines and benchmarks to support your ability to handle challenging conversations during coaching.

**Instructor(s):** Amanda V Louzon, LDO, ABO

**A6-603 Intelligent Marketing: Applying AI Strategies for Practice Success**

ASOA Marketing and Business Development

Introductory

**Course Description**

This course will help attendees understand the rapidly evolving digital landscape, leveraging artificial intelligence (AI) and how it can give ophthalmology practices a significant competitive edge. This course is tailored specifically for ophthalmology administrators and marketing managers eager to navigate the AI revolution. Participants will dive deep into real-world applications of AI in ophthalmology marketing, uncovering strategies to attract, engage, and retain patients more effectively. Discover how predictive analytics, chatbots, phone reporting tools, auto calls and personalized SEO content can transform your patient outreach and growth.

**Instructor(s):** Paul M Stubenbordt, MBA

**A6-604 Co-Management Without Fear**

ASOA Risk Management and Compliance

Introductory

**Course Description**

Co-management is in the news and not in a flattering way. In 2023, there have been several million-dollar settlements with the Department of Justice related to this issue. Surgeons and comanaging doctors need to review and revise their co-management protocols to remove the taint of kickback. This course reviews the original CMS instructions, subsequent OIG opinions, and the guidance from professional societies: ASCRS, AAO and AOA. Related subjects are co-management of refractive procedures and advanced technology IOLs. Best practices are defined.

**Instructor(s):** Mary Pat Johnson, COMT, COE, CPC, CPMA; Brandy H Sperry, COMT, COE, CPC, CPMA



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**A6-605 Private Equity and the Administrator Career Pathway**

ASOA Leadership and Strategic Management

Experienced

**Course Description**

Private equity does not have to be the doom of the administrator's career. In fact, understanding PE before going through a transaction can result in financial rewards that some administrators are unaware of. This presentation will walk through the why private equity targets physician practices. What a transaction requires both from a diligence standpoint but also positioning yourself as a private equity leader. Walk away with common financial incentives, as well as the foundations of a private equity contract including bonus and equity. Finally, learn some secrets of surviving in the new company post transaction.

**Instructor(s):** Angela D Casazza, MHA, COE

**A6-606 Current Coding Controversies**

ASOA Coding and Billing

Mid-Level

**Course Description**

This course will explore the unique challenges and intricate specifics to eye care billing and coding. We will discuss current Medicare Administrative Contractor and third-party payer policy changes that are relevant to your practice and ways to ensure timely reimbursement. We will also review documentation requirements for complex procedures, Co-Management, Minimally Invasive Glaucoma Surgery (MIGS) and diagnostic tests.

**Instructor(s):** Brittney Irwin, COT, CPC; Laurie K. Brown, MBA, COMT, COE, CPMA; Kirk Mack, COE, COMT, CPC, CPMA





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**8:30 a.m.– 9:30 a.m.**

## **Practice Management Courses**

### **A7-101 Not Another Tech Meeting! Other Ways to Engage Your Techs**

ASOA Leadership and Strategic Management

Introductory

#### **Course Description**

This course will provide unique insight from both a long-time administrator and their technician trainer. Instructors will present their viewpoints on common workplace issues and how an influx of tech meetings may not yield desired results. Instructors will review how they continually engage their staff through meaningful conversation, feedback, and planned activities.

**Instructor(s):** Brenea Facchini, BSc, COMT, CPC, OSC; Victoria Elkins, MBA, COE, COT

### **A7-102 Business Operations for New Administrators**

ASOA Business Operations

Introductory

#### **Course Description**

Whether you are new to practice administration or new to ophthalmology, you will be able to have a road map for success based on this course. Attendees will learn areas of responsibility, resources available, and communication techniques to establish expectations. Additionally, presenters will provide a useful tool that audience members may use to customize their own plan.

**Instructor(s):** Maureen L. Waddle, MBA; Laurie K. Brown, MBA, COMT, COE, CPMA

### **A7-103 Laugh Your Way To Refractive Success: Using Humor To Ease Patients' Concerns About Refractive Surgery**

ASOA Marketing and Business Development

Mid-Level

#### **Course Description**

Refractive Surgery is a serious business. But a little humor can go a long way in putting patients more at ease and helping them get over their fear of having surgery. This presentation will provide attendees a humor-filled course will learn how to inject humor into their marketing messages that help make patients realize there may be a better way to seeing the world than through glasses or contacts. Specific campaign messaging will be presented and discussed. The overall goal is let attendees know that it's okay to take a professional, but humorous approach to refractive education and communication with patients.

**Instructor(s):** Michael W. Malley, BA



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**A7-104 Compliance Dilemmas**

ASOA Risk Management and Compliance

Experienced

**Course Description**

This course presents several fresh, new case studies examining current compliance issues that attract attention from payors, regulators, and law enforcement. Grey areas related to billing, coding, and reimbursement are discussed by the expert speakers. Questions are welcome during this interactive session.

**Instructor(s):** Allison Shuren, MSN, JD; John McInnes, MD, JD; Kevin J. Corcoran, BSc, COE, CPC, CPMA

**A7-105 Unleashing Optical Excellence: Powering Your Way to High Performance and Profitability**

ASOA Business Operations

Mid-Level

**Course Description**

Unleashing Optical Excellence: Powering Your Way to High Performance and Profitability Establishing a high performing and a highly profitable optical business is no easy task. Frequently practices attempt to be something to everyone, and in that, lose a sense of who they are and who they are serving. This course will provide a step-by-step process to establish a profitable practice that aligns with its mission and values. Topics include: • Optical leadership and interdepartmental collaboration • Technology - streamlining the sales process for both staff and patients • Vendor negotiations & retail pricing, keeping vision plan reimbursements in mind throughout the process.

**Instructor(s):** Barbra A Dey, BScOptom, COE

**A7-106 You're Being Audited - Now What?**

ASOA Coding and Billing

Introductory

**Course Description**

Receiving a payment from a payor is not a guarantee that the claim was correct or valid. When there is doubt about its legitimacy, then a postpayment audit will investigate it, usually with an implied viewpoint that an overpayment exists. Audits are scary, time consuming, expensive, and possibly very detrimental. How do they differ? How should you respond? Learn from these presenters who are experienced with helping practices with audits and their consequences.

**Instructor(s):** Mary Pat Johnson, COMT, COE, CPC, CPMA; Brandy H Sperry, COMT, COE, CPC, CPMA



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**9:45 a.m.– 10:45 a.m.**

## **Practice Management Courses**

### **A7-203 Differentiating Your Optical Practice from the Box Chains**

ASOA Marketing and Business Development

Introductory

#### **Course Description**

This course will teach how to use marketing to drive a new culture of buyers to your optical practice, rather than the big box chains. The focus will be leveraging your existing patient base and promoting your optical shop internally and externally.

**Instructor(s):** Amanda V Louzon, LDO, ABO

### **A7-204 Creating Synergy: Building a Culture of Collaboration Between Ambulatory Surgical Centers and Clinics**

ASOA Leadership and Strategic Management

Experienced

#### **Course Description**

This course will delve into the evolving landscape of healthcare, where the effective collaboration between ambulatory surgical centers (ASCs) and ophthalmology practices is paramount for delivering high-quality patient care. This joint presentation will explore the innovative methods employed by the heads of these distinct components to cultivate a cohesive culture of teamwork within their practice. Our session will explore the challenges and opportunities posed by the convergence of ASCs and ophthalmology practices. Furthermore, attendees will gain insights into practical strategies for nurturing a shared sense of purpose among staff members. Real-world case studies and success stories will be presented to illustrate the tangible benefits of a unified approach.

**Instructor(s):** Sarah H Alyas, JD; Sarah H Alyas, JD; Teresa Thompson, MA

### **A7-205 Interpreting Financial Statements To Successfully Manage Your Business**

ASOA Business Operations

Mid-Level

#### **Course Description**

Review financial statements including Profit and Loss, Balance Sheet, and Cash Flow statements and how all three can be used effectively to manage operations, prepare for growth, manage owner compensations models, and be confident in financial performance. Identify hidden gems in each that can be very insightful.

**Instructor(s):** Dixon Davis, MBA, MHSA, CMPE



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## Campfire Sessions

### **Diversity Workshop**

DIVERSITY is at the very core of what we do. Whether it is working with patients, implementing groundbreaking technologies, or delivering and restoring the power of sight, DIVERSITY allows us to enhance our mission while bringing our purpose to fruition. This workshop will allow us to delve into key intersections of effective teambuilding, enhancing culture, and retaining our employees through the lens of Diversity, Equity, & Inclusion. Since ALLY without ACTION simply resides as a fancy four letter word, we will aim to tackle the intricacies of how true DIVERSITY makes a positive impact on our teams, our companies, and ultimately optimizes our work/life balance. Are you ready? See you there!

**Presenter:** H.B. Pierre Simon Jr.

### **The Past, Present and Future of Private Equity**

The facilitators of this campfire session will provide a short overview of what private equity is, the role it has played in eyecare in the past, where things stand today, and what we can expect moving forward. They will also touch on ways in which administrators can evaluate a potential sale to PE, prepare for an eventual sale, or adjust to life after a sale. Following the brief opening remarks, the majority of the time will be spent as a discussion with the audience addressing any questions that may be presented or topics that the group wishes to explore.

**Presenters:** Angela Casazza, MHA, COE and J. Matthew Owens, JD

### **How to Burn Bright, Not Out**

Join us for an engaging session where we explore practical strategies to combat the very real challenges of burnout. Through interactive discussions and actionable insights, discover simple strategies to feel more in control and help lessen the downward pressure of burnout.

**Presenters:** Laura Baldwin, RN, SHRM-CP and Tom Corcoran, CMOM



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## **Practice Management Courses**

### **A7-301 Building Excellence from Within: A Spotlight on Our Technician Training Program**

ASOA Leadership and Strategic Management

Mid-Level

#### **Course Description**

This course will take you on a journey through the heart of our training initiatives, showcasing the transformative results it has brought to our organization and its talented technicians. This will be a compelling presentation that delves into the profound impact of our organization's technician training program.

**Instructor(s):** Amanda Turner, OCS, COE; Stephanie Collins, MBA, COA

### **A7-302 Attracting, Retaining, And Motivating Staff Through Pay Transparency And Accountability**

ASOA Human Resources

Mid-Level

#### **Course Description**

This course will outline the approach I took as administrator of my practice to re-set our approach to pay transparency and attendance accountability with our staff. Pay level had always been a black box so to speak, and staff would either feel underpaid, or ill-motivated to pursue further development. Through a combination of utilizing national wage benchmarks based on job-level (certification) and tenure, and internal practice factors, I created a pay-scale that allowed me to be transparent with the staff about why they are paid what they are, and what further development pursuits (cross-training, certifications, tenure) will do for their pay. Separately, but related, I created an in-depth point system in attempt to solve the epidemic of staff absences and tardiness that wreak havoc on day-to-day operations and morale.

**Instructor(s):** Elizabeth Monroe, MA, CPSS, PHR, COE; Tim Marney

### **A7-303 Cracking the Code: Transforming PPC & Social Media Leads Into Premium Patients**

ASOA Marketing and Business Development

Introductory

#### **Course Description**

This course will equip you with the knowledge and skills needed to overcome common challenges in converting PPC (Pay-Per-Click) and social media leads for refractive and premium cataract surgery. You'll learn the exact strategy it takes to be successful from the moment they become a lead on Facebook all the way to showing up for their appointment in your practice. You'll gain actionable insights to boost conversion rates to grow premium channel volume in today's climate.

**Instructor(s):** Nick Sideris, BA



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**A7-304 True Risk, True Assessment: Beyond Checking the Box for MIPS**

ASOA Risk Management and Compliance

Experienced

**Course Description**

This course is a deep dive on truly evaluating internal and external risks to your practice. It walks through a structured path to transcend the old-style Security Risk Assessment and towards understanding all the global risks to your practice.

**Instructor(s):** Wes Strickling, BA; Chris M Dean

**A7-305 Managing HR and Compliance in a Small Practice: Case Studies From the Trenches**

ASOA Business Operations

Introductory

**Course Description**

This course will provide practices without a dedicated HR department or compliance team tools to effectively manage HR and compliance issues. Through the use of real world, practical case studies, the course will explore best practices for attendance policies, benefit management, and employee education, as well as tips for maintaining compliance related to patient privacy and fraud, waste, and abuse in an increasingly complex environment.

**Instructor(s):** Gretchen W. Kimble, JD, COE

**A7-306 Can We Balance Health and Care? Examining the Patient Journey**

ASOA Leadership and Strategic Management

Mid-Level

**Course Description**

This course will explore the patient journey to, thru, and beyond the physician / clinic visit, with an emphasis on satisfying a patient's desire for a full circle of CARE. We'll explore some gaps in the overall process by looking thru a patient's perspective of their clinic visit.

**Instructor(s):** Donna M. Vierheller, BA, COE



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**1:30 p.m.– 2:30 p.m.**

## **Practice Management Courses**

### **A7-401 How to Collect Money Upfront: A Guide for Practice Administrators**

ASOA Business Operations

Introductory

#### **Course Description**

The main objective of this course is to help practice administrators understand the benefits and challenges of upfront payment collection and to provide them with practical strategies and best practices to implement it in their own settings. Upfront payment collection can improve cash flow, reduce bad debt, and increase patient satisfaction, but it also requires effective communication, staff training, and policy changes.

**Instructor(s):** Eric Deupree, BSc; Elizabeth Monroe, MA, CPSS, PHR, COE; Kimberly A Hickey, ABO

### **A7-402 Raising the Bar: Technology's Impact on Patient Experience**

ASOA Business Operations

Mid-Level

#### **Course Description**

This course will dive deep into how technology can either enhance or hinder the patient experience. Discover how to streamline your technologies to increase efficiency, decrease overhead and enhance your customer experience in every aspect of the practice.

**Instructor(s):** Carrie Jacobs, COE; Heather A. Bush, COT

### **A7-403 Speak The Premium IOL Marketing Language Every Presbyope Is Waiting To Hear! No Interpreter Required**

ASOA Marketing and Business Development

Mid-Level

#### **Course Description**

The richest, most qualified and easy to target new patient audience in ophthalmic history is the cash-paying 45-64 year-old presbyope eager to get out of readers and bifocals. For refractive surgeons and their management teams looking to capture this lucrative and appreciate audience, this course will provide attendees an easy-to-learn 'marketing language' is the quickest and most proven way to capture and convert this audience. Attendees of this didactic and entertaining course will learn the specific dialogue and language requirements to successfully use in generating (and converting) potential Premium IOL presbyopic patients. The overall goal is get attendees quickly up to speed on giving Refractive Lens Exchange patients what they want to hear.

**Instructor(s):** Michael W. Malley, BA



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**A7-404 Creating a Culture of Extreme Ownership in Your Practice**

ASOA Leadership and Strategic Management

Mid-Level

**Course Description**

This course will help attendees get the highest return on their biggest investment: their staff. Great employees think and behave as though they are the owners of the business; meaning, they are motivated to create the best outcomes and they take ownership of their work and their decisions. They are your greatest asset. This course will help you adopt the leadership philosophy of extreme ownership using excellent communication, prioritization, and accountability to boost productivity and motivate your team to deliver at their highest potential.

**Instructor(s):** Dianne M Callahan, BA

**A7-405 Peer Pressure – Tips for a Successful Transition from Coworker to Manager**

ASOA Leadership and Strategic Management

Introductory

**Course Description**

You have recently been promoted to a leadership position, now what? We all know the shift from colleague to leader can be difficult and somewhat intimidating. Participants will learn strategies to bridge the gap including creating new boundaries as a leader, setting expectations for staff and metrics for measuring performance all while maintaining a positive work culture.

**Instructor(s):** Lee Ann McKinney, COT, OSC; Valerie Honeycutt, COT

**A7-406 Using Analytics to Establish and Track Your Revenue Cycle Key Performance Indicators (KPIs)**

ASOA Coding and Billing

Experienced

**Course Description**

In this course, attendees will learn how to go beyond traditional KPIs and develop a more successful approach to managing RCM. Through analytics unavailable in standard practice management systems, they will discover how to avoid revenue loss, improve team deployment decisions, and identify overlooked opportunities.

**Instructor(s):** Janna Mullaney, COE





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**Sunday, April 7**

**2:45 p.m. – 3:45 p.m.**

## **Practice Management Courses**

### **A7-501 Gamifying Your Goals: How Measuring Goals Can Improve Your Progress**

ASOA Leadership and Strategic Management

Experienced

#### **Course Description**

This course will explore how gamifying your practice can lead to higher productivity, an increase in process buy in, and an improvement in your culture...and your bottom line. We will look at what gamifying is, why it works, and how to implement it in your practice. We will review two scenarios and discuss how we implemented gamifying into two of our departments, why it's important to create an easy to understand scoring system, and how aligning your gaming goals with your practice goals can help your team members focus on the prize at the end of the day.

**Instructor(s):** Brad Van Galen, MBA, COE, CPSS; Heather M. Gerlach, BA, COE, COA, ABO

### **A7-502 Getting Your Whole Team Involved in Compliance**

ASOA Risk Management and Compliance

Introductory

#### **Course Description**

Achieving and maintaining compliance in a medical practice requires meeting at a hub where the patient care, documentation, billing, and staffing spokes meet. It requires the efforts of all members of a medical practice and involves ongoing oversight to ensure success. A compliance plan outlines the responsibilities of the compliance officer or compliance team; everyone is required to participate.

**Instructor(s):** Carrie Jacobs, COE; Mary Pat Johnson, COMT, COE, CPC, CPMA

### **A7-503 How-To Guide: Launching Elective Service & Getting it RIGHT**

ASOA Marketing and Business Development

Introductory

#### **Course Description**

This course will provide invaluable insight from an ophthalmology marketing specialist, with over 27 years of experience in the industry, both in a practice and on the agency side. This course will provide detailed, expert advice and direction for effectively introducing a new elective service line into your ophthalmology practice (dry eye, optical, vision correction, aesthetics, premium cataracts, etc). Attendees will learn 7 key steps for success to help drive new elective revenue: location; team coaching; branding; patient education; cross-promotion of services; online presence; and taking word of mouth to the next level. Featuring actual case studies, attendees will see real success with real practices utilizing this proven how-to guide.

**Instructor(s):** Lisa Chmura, BA



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**A7-504 Optimizing Efficiency for Office-Based Surgery**

ASOA Business Operations

Introductory

**Course Description**

This course is dedicated to exploring and enhancing the efficiency of office-based surgical practices. Through an examination of industry best practices and real-world case studies, participants will gain an understanding of key factors affecting the efficiency of office-based surgery and valuable insights into the comparative efficiency of different surgical practice settings, helping them make informed decisions about their operations.

**Instructor(s):** Hugh Glatts, BSc; Tony Burns, MBA, CSFA

**Roundtables**

<b>TOPIC</b>	<b>FACILITATOR</b>
Benchmarking & KPIs	Andrew T. Maller, MBA, COE
Coding & Billing	Kevin J. Corcoran, BSc, COE, CPC, CPMA and Brandy Sperry, COMT, COE, CPC, CPMA
Optical Management & KPIs	Aron M. Arkon, LDO
Private Equity	J. Matthew Owens, JD



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**Sunday, April 7**

**4:00 p.m.– 5:00 p.m.**

## **Practice Management Courses**

### **A7-601 The First Impression Matters: Onboarding Customer Service Training**

ASOA Leadership and Strategic Management

Introductory

#### **Course Description**

This course will teach participants the art of creating memorable patient experiences, building strong patient relationships, and addressing various patient needs. During this interactive and engaging session, we will delve into the core principles of effective communication, active listening, problem-solving, and empathy, all of which are vital for delivering top-notch service. By the end of this course, participants will emerge as customer service champions ready to make a positive impact on their patients and contribute to their organization's growth. Join us in this journey towards delivering an exceptional patient experience even before their first visit.

**Instructor(s):** Amanda Turner, OCS, COE; Myra Lopez-Evans, BA, COA

### **A7-602 I Can't Sleep! Compliance and Regulatory Issues Keeping Administrators Awake at Night**

ASOA Risk Management and Compliance

Mid-Level

#### **Course Description**

This course will use a series of hypothetical scenarios based on real questions from ophthalmology practice across the country to explore compliance and regulatory issues practice are struggling with day-to-day. The goal is for the audience to share thoughts and responses to the hypotheticals.

**Instructor(s):** Allison Shuren, MSN, JD; John McInnes, MD, JD; Loreli Wright, MHA, JD

### **A7-603 Preparing for a Sale: A Primer for Selling Your Practice to an Outside Party**

ASOA Leadership and Strategic Management

Experienced

#### **Course Description**

This course will provide a comprehensive look at the impact of private equity and consolidation in eye care and how to best prepare for a potential sale. This panel discussion, featuring industry experts, will describe the key business, legal, compliance, and real estate elements that practices must understand before they enter into any deal process.

**Instructor(s):** J. Matthew Owens, JD; Andrew T. Maller, MBA, COE; Collin Hart, MBA; Kirk Mack, COE, COMT, CPC, CPMA



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**A7-604 Hiring The Right Staff - A New Way Of Thinking From A Seasoned Administrator**

ASOA Human Resources

Mid-Level

**Course Description**

Finding and hiring staff is a challenge. In this course new and different ideas will be discussed as what worked 40 years ago does not apply to today.

**Instructor(s):** Laurie Darling, COT; Patty Schlesier

**A7-605 Research Ready: Preparing Your Practice for Clinical Research**

ASOA Business Operations

Introductory

**Course Description**

This course will present an overview of getting starting in clinical research in a private practice ophthalmology clinic. Instructor will discuss what worked - and what didn't - in their practice's clinical research journey, as well as basic research terminology and guidelines.

**Instructor(s):** Jacqueline Whinery, CCRC, COA

**A7-606 Twenty Questions to Keep Your Billing Department on Track**

ASOA Coding and Billing

Introductory

**Course Description**

This course will teach attendees how to evaluate the practice's billing department operations, improve department efficiency and review ways to evaluate and enhance coding and reimbursement. In addition, this course will review the importance of key performance indicators and how knowing these metrics can improve cash flow, employee performance and practice reimbursement.

**Instructor(s):** Deborah A. Davis, COE; Mary Pat Johnson, COMT, COE, CPC, CPMA

**Monday, April 8**

**8:30 a.m.– 9:30 a.m.**

**Practice Management Courses**

**A8-101 Navigating the Ophthalmology Horizon: Bridging Generations for Practice Excellence**

ASOA Leadership and Strategic Management

Experienced

**Course Description**

This joint presentation brings together the perspectives of two executives at opposite ends of their careers in ophthalmology—a dynamic interplay between a newcomer just embarking on their journey and a seasoned executive preparing for retirement. Together, we explore the potential advantages and challenges that each brings to the table and how recognizing these can lead to a stronger and more vibrant ophthalmology practice. Our session begins by discussing how a newcomers innovative ideas,



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technological fluency, and hunger for growth can drive the practice forward, bringing about positive changes and keeping it relevant in a rapidly evolving field. We will also address the invaluable wisdom and experience that a retiring executive offers.

**Instructor(s):** Sarah H Alyas, JD; Thomas T Brown-Spencer, JD, COE

**A8-102 Staffing Excellence – Side Effects May Include Exceptional Patient Care and Improved Practice Performance**

ASOA Business Operations

Mid-Level

**Course Description**

Staffing issues plague many industries including healthcare. Building a good staff requires a lot of effort. Training, retraining and cross training are critical, particularly if you face a staff shortage. Retaining good employees requires engaging them in the practice beyond their list of required tasks, acknowledging their accomplishments, supporting them as they learn new things, and coaching them in managerial roles. In this interactive program we will share tips and tricks to creating a cohesive, productive staff.

**Instructor(s):** Patricia M. Morris, MBA, COE; Mary Pat Johnson, COMT, COE, CPC, CPMA

**A8-103 How To Ensure Your Marketing Messaging Is Keeping Current As Advances in Refractive Surgery Technology & Procedures Evolve At Record Speed**

ASOA Marketing and Business Development

Introductory

**Course Description**

This one-hour didactic course will provide attendees a step-by-step guide in how to develop a 12-month creative calendar that enables practices to stay ahead of the creative curve needed to keep pace with the quarterly advances in technology being made in refractive surgery. Attendees will learn how to streamline and simplify their season creative marketing calendars and what steps to take as they market new refractive technology & services to current and potential new patients.

**Instructor(s):** Michael W. Malley, BA; Cory J. Pickett, MSN, FNP-C, CRNO

**A8-104 Addressing MIPS Cost Measures for Ophthalmology**

ASOA Coding and Billing

Mid-Level

**Course Description**

2022 marks the first year that Cataract Surgeons have been scored in Cost since pre-pandemic. There has been a lot of questions raised by how this is scored & how a surgeon can improve their score. In this course, learn how the measure was developed, what costs are included in the measure, how to interpret feedback reports, and how to advocate for improvements to this and future measures.

**Instructor(s):** Randall W Marsden, BSc



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**A8-105 Staff Retention Strategies**

ASOA Human Resources

Mid-Level

**Course Description**

COVID rocked our worlds and, years later are still feeling the effects of it. Staff retention is a hot topic in our circles, so let's talk about it! This course discusses the causes for employee turnover and strategies which aid in staff retention. Actionable insight will be provided and a robust Q & A to follow.

**Instructor(s):** Sharon C. Alamalhodaie, COMT, OCS

**A8-106 How Practices Can Reduce Loss and Increase Profits for Retina Injectables**

ASOA Coding and Billing

Mid-Level

**Course Description**

Insurance companies intentionally make it difficult for practices to get paid for drugs. Step therapy, biosimilars, authorizations, and constant changing insurance requirements are challenges. All steps in the process will be reviewed, including ordering, scheduling, authorizing and billing for J and Q codes. There are ten steps where a practice can fall short and not get paid. This course will identify all ten pain points. Techniques to manage the landmines for administrators, technicians, billers and the physician will be presented, including comparison of software from the distributors to reduce loss and improve profitability for the practice.

**Instructor(s):** Leonard H Ginsburg, MD; James F. Freeman, MD, ABO; Haylee Olson, MBA

**Monday, April 8**

**9:45 a.m.– 10:45 a.m.**

**Practice Management Courses**

**A8-201 Developing the Next Generation of Ophthalmic Professionals**

ASOA Leadership and Strategic Management

Experienced

**Course Description**

This course will equip participants with the necessary knowledge, skills, and strategies to train, guide, and inspire future ophthalmic professionals, and create new generations of team members with a passion for the specialty of ophthalmology. The panel will share tips that are actionable and can be easily integrated into your practice.

**Instructor(s):** Laura Baldwin, RN, SHRM-CP; Savory A. Turman, BSc, COMT, OCS



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**A8-202 Vision Plans How to Assess Which Ones Fit Into Your Practice and Thrive**

ASOA Business Operations

Mid-Level

**Course Description**

This course will detail the steps you should take to evaluate a vision plan that you are currently on, or how to assess a plan you are considering joining. It will review common pitfalls and strategies to maximize reimbursements that align with your business mission and core values. The second part of the course will give you a step-by-step process for becoming an Out of Network provider on a vision plan while retaining a high % of your established patients.

**Instructor(s):** Barbra A Dey, BScOptom, COE

**A8-203 Creating an Effective Incentive Compensation for Your MD's and OD's**

ASOA Business Operations

Introductory

**Course Description**

This course will cover several specific ways to create an effective incentive program for your MD and OD work group. You will learn the key elements that are required to create an effective incentive program. Adding an effective incentive program will have many benefits including increasing your capture rate and gross and net profit. Giving your professional staff an incentive program will generally improve workspace satisfaction.

**Instructor(s):** Aron M. Arkon, LDO

**A8-204 How to Create a Magnetic Patient Experience Inspired by Disney**

ASOA Marketing and Business Development

Mid-Level

**Course Description**

This course will help attendees see the patient journey in a whole new way. What does it mean to create a magnetic patient experience? When patients experience unforgettable, above and beyond care at every step of their journey, they stick with you like a magnet. You don't have to worry about losing them before the consult, or before treatment. You can be assured that they will provide an excellent testimonial, refer others, and trust you for their future needs. Creating unforgettable experiences is what Disney does so well. In this session, you'll learn how to apply the Disney principles of customer service to your practice and build a brand of excellence.

**Instructor(s):** Jean A Moody; Dianne M Callahan, BA



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## Campfire Sessions

### Journey to COE

Interested in obtaining your COE or unsure of what COE is? Come learn everything you need to know about the Certified Ophthalmic Executive Certificate Program.

Presenters: Amanda Turner, COE, OCSR, Brittany N. Williams, COE, COA and Jennifer Durham

### Ladders for Career Development

In this session, Austin Retina Associates will share:

- The Why behind the Tier Program
- Developing the hard & soft skills for Team Development
- Evaluating and creating levels of assessments
- Table break out where small groups design a tier for a specific position
- Share summaries of each group
- Attendees will have a solid takeaway template

Presenter: Wendy Chance, CTS

**Monday, April 8**

**11:00 a.m.– 12:00 p.m.**

## Practice Management Courses

### **A8-301 A Simple, Effective Plan for Pricing Refractive Cataract Surgery**

ASOA Risk Management and Compliance

Mid-Level

#### **Course Description**

Premium, advanced technology IOLs and refractive surgery at the time of cataract surgery provide physicians and patients with numerous options. Additional pre-, intra- and post-operative care may be required. How should you approach pricing these services to get physician acceptance, patient acceptance, and management acceptance? What are the limitations to formulating these patient-pay packages? This expert faculty with years of experience will guide you. Practical examples illustrate the process.

**Instructor(s):** Kevin J. Corcoran, BSc, COE, CPC, CPMA; Mary Pat Johnson, COMT, COE, CPC, CPMA; William B Rouborn Jr., BSc





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**A8-302 Tips & Tricks of High-Performing ASCs**

ASOA Business Operations

Introductory

**Course Description**

This panel discussion course will teach attendees key ways to increase the flow of patients, staff, and materials management within their ASC. The panel will also discuss planning for a new ASC and methods for implementing change in an existing ASC. Attendees will also learn about imaging technologies or procedure options that fit well into an ASC to help them maximize use of their facility.

**Instructor(s):** Jared VanderWeele, MA; Todd Albertz, CASC; Nikki Hurley, RN, MBA, COE; Daniel D. Chambers, MBA, FASOA, COE

**A8-303 The Art and Science of Optimizing the Cataract Patient Journey**

ASOA Marketing and Business Development

Mid-Level

**Course Description**

This course will address the competing priorities of the premium lens channel: the need to emotionally appeal to the patient while at the same time optimizing and enhancing team performance. Strategies for integrating the emotional decision-making component of the patient journey while meeting operational goals will be presented.

**Instructor(s):** Myra Cherchio, COMT, COE; Carrie Jacobs, COE

**A8-303 Mastering SEO: From Basic Concepts to Advanced Strategies for Web Presence and Growth**

ASOA Marketing and Business Development

Introductory

**Course Description**

This course will help ophthalmology marketing personnel and administrators. Embark on a comprehensive SEO journey, from grasping fundamental concepts to mastering advanced strategies tailored to the ophthalmic industry's specific needs. Amplify your digital presence, strategically drive targeted traffic, and enhance patient engagement with a harmonious blend of theoretical and practical learning experiences. The course is dedicated to ensuring participants not only understand SEO mechanics but can also adeptly apply them to achieve measurable results.

**Instructor(s):** Paul M Stubenbordt, MBA

**A8-304 Ophthalmology Career Advancement Benchmarks**

ASOA Leadership and Strategic Management

Mid-Level

**Course Description**

Explore key milestones and strategies to help accelerate your team's ophthalmology career. Learn to identify, establish and measure benchmarks, ensuring your team's professional success and growth.



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**Instructor(s):** Mitchell C. Shultz, MD, ABO

**A8-305 Frontline Empowerment: Cultivating Problem-Solving Prowess**  
ASOA Leadership and Strategic Management                      Introductory

**Course Description**

Effective problem identification and root cause analysis are essential skills in the healthcare sector, where patient quality care and maintaining efficiency are paramount. This course, “Frontline Empowerment: Cultivating Problem-Solving Prowess” is designed to equip your frontline employees with the knowledge and tools needed to become effective problem solvers using Lean principles.

**Instructor(s):** Myra Lopez-Evans, BA, COA; Stephanie Collins, MBA, COA

**A8-306 Buying or Selling: How Much Is the Practice Worth?**  
ASOA Business Operations                      Experienced

**Course Description**

Whether buying or selling a practice, it is important to understand how value is determined. This course will provide an overview of the standard methods for estimating value including tangible and intangible asset calculations and collectable accounts receivable. This includes a discussion of market methods and trends in goodwill value. Case studies will be explored to better understand financial concepts.

**Instructor(s):** Maureen L. Waddle, MBA; Jordan Nelson, BSc

**Monday, April 8**

**1:30 p.m.– 2:30 p.m.**

**Practice Management Courses**

**A8-401 Beyond the Paycheck: Creative Employee Perks and Recognition Strategies**  
ASOA Leadership and Strategic Management                      Mid-Level

**Course Description**

: This course will empower HR professionals, managers, and business leaders with the knowledge and tools needed to create a workplace culture that values and appreciates employees on a deeper level. In today's competitive job market, attracting and retaining top talent goes beyond offering competitive salaries. By the end of this course, participants will be equipped with the knowledge and strategies needed to design and implement creative employee perks and recognition programs that foster a more engaged, motivated, and loyal workforce. Join us on this journey to go "Beyond the Paycheck" and create a workplace where employees feel truly appreciated and valued.

**Instructor(s):** Amanda Turner, OCS, COE; Stephanie Collins, MBA, COA



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**A8-402 Who's Quitting Next? Planning for Staffing Changes**

ASOA Human Resources

Introductory

**Course Description**

We have experienced staffing shortages unlike any other time in recent history. It is necessary to be prepared for unanticipated resignations. Two weeks' notice is not enough time to hire, train and acclimate the employee's replacement. When the person has supervisory responsibilities, the void is even greater.

**Instructor(s):** Jane T. Shuman, MS, COT, COE, OCS; Brenea Facchini, BSc, COMT, CPC, OSC

**A8-403 See How Basic AI Software Can Automate Admin Duties, Reduce Staffing Costs, Enhance Your Website & Plan Your Next Marketing Strategy**

ASOA Marketing and Business Development

Experienced

**Course Description**

With the ever-increasing presence of Artificial Intelligence (AI) in the ophthalmology industry, this course will not only teach attendees the complexities of using AI but also the opportunities it present to practices needing to broaden the capabilities of their website and lesson staff requirements. These AI strategies are designed to decrease patient-to-practice oral communication and help eliminate the burdens of repetitive manual tasks. By attending this course, participants will leave with a more manageable understanding of AI opportunities as they apply to their practice website functions and capabilities.

**Instructor(s):** Michael W. Malley, BA; Lawson A Boothe, MBA

**A8-404 Documentation and Billing for Ophthalmic Diagnostic Testing**

ASOA Coding and Billing

Introductory

**Course Description**

Within Medicare, there is, on average, one diagnostic test for every eye exam, and the number is growing. So, not surprisingly, payors continue to scrutinize ophthalmic diagnostic services. What documentation is reasonable for diagnostic tests? How often can tests be repeated? What rules apply to the tests you perform? The expert instructor will address key points, common misunderstandings, and essential principles needed to support your claims for ophthalmic tests.

**Instructor(s):** Mary Pat Johnson, COMT, COE, CPC, CPMA



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**A8-405 Designing & Developing an Ophthalmic ASC**

ASOA Business Operations

Introductory

**Course Description**

This course will show from A to Z the difficulties of designing/developing a successful ophthalmic ASC and how to avoid the pitfalls. Starting from your decision to move forward and ending with your ASC's successful Certification this course will bring the pearls of having helped design/develop over 375 ASC's across the country to bear. If you want a mean/lean hyper efficient ASC with minimal hassles this course is for you.

**Instructor(s):** John A Marasco, BA

**A8-406 Physician Compensation Trends for Employed and Owner Providers**

ASOA Business Operations

Mid-Level

**Course Description**

This course will provide an overview of current trends in provider compensation. The course will examine various methods for compensating employed providers so attendees are better prepared for contract negotiations. This course will also provide an overview of income sharing models for owners in group practices.

**Instructor(s):** Andrew T. Maller, MBA, COE

**Monday, April 8**

**2:45 p.m. – 3:45 p.m.**

**Practice Management Courses**

**A8-501 Authentic Leadership**

ASOA Leadership and Strategic Management

Experienced

**Course Description**

This course will teach new and experienced leaders how to make monumental differences in practice growth. Using proven training leaders will learn an advanced leadership paradigm. Practice leaders will leave this course with a playbook and resources that will forever change the trajectory of their careers and practices - resulting in millions of dollars of new revenue.

**Instructor(s):** Kurtis L. Wankier, MBA



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**A8-502 Best Practices for Tackling Aging A/R**

ASOA Business Operations

Mid-Level

**Course Description**

In this course, you will learn how to effectively manage your aging accounts receivable (AR) and improve your revenue cycle performance. You will gain practical skills and tools to analyze, monitor, and resolve your AR issues.

**Instructor(s):** Elizabeth Monroe, MA, CPSS, PHR, COE; Laurie K. Brown, MBA, COMT, COE, CPMA

**A8-503 Digital Storytelling and Social Media: How to Optimize Your Practice's Online Presence**

ASOA Marketing and Business Development

Introductory

**Course Description**

This course will shed light on the potential of digital platforms. We will delve into how the art of storytelling, when applied to these digital mediums, can illuminate your practice. The course will chart the guidelines to create compelling digital narratives about patient success stories and practice innovations, while staying within HIPAA guidelines. We will also sift through the dynamic maze of social media management, providing insights on optimizing platform selection, content creation, and audience engagement.

**Instructor(s):** Alexa Montesinos, MBA

**A8-504 ADA, HIPAA & More: Your Guide to Website Compliance in 2024**

ASOA Risk Management and Compliance

Introductory

**Course Description**

As online accessibility and privacy laws evolve, ensuring your organization's website complies with 2024 ADA and HIPAA rules is critical. This presentation offers practical guidance for meeting standards through WCAG 2.1/3.0 analysis, accessible vs. non-accessible examples, and the most frequent ADA violations and fixes. We'll also cover critical HIPAA website issues including secure PHI storage/transmission in online forms and the use of analytics and tracking technology that aligns with recent HHS technology guidance and requirements for protecting patient info. Attendees will leave well-versed in the latest WCAG and HIPAA criteria, with strategies for making your website fully ADA and HIPAA-compliant in 2024 and beyond.

**Instructor(s):** Jamieson Webking



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**Roundtables**

TOPIC	FACILITATOR
Administrator Challenges - The Good, the Bad and the Ugly	Hayley Boling, MBA, COE
Clinical Efficiency	Jane T. Shuman, MS, COT, COE, OCS
HR Nightmares	Patti J. Barkey, COE
Transition to Management	Carrie Jacobs, COE

**Monday, April 8**

**4:00 p.m.– 5:00 p.m.**

**Practice Management Courses**

**A8-601 Leading Change: Why Leadership Development Matters Now More Than Ever**

ASOA Leadership and Strategic Management

Mid-Level

**Course Description**

This course will inspire, inform, and empower your team to recognize the immense value of investing in leadership growth. We will offer an in-depth exploration of the strategies and initiatives our organization has implemented to cultivate and nurture leadership talent from within. This engaging presentation is a testament to our commitment to empowering individuals and driving organizational excellence through effective leadership development.

**Instructor(s):** Amanda Turner, OCS, COE; Stephanie Collins, MBA, COA



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**A8-602 Benchmarks to Achieve Optimal Flow and Efficiency in Your Practice**

ASOA Business Operations

Introductory

**Course Description**

This course will teach you how to use key benchmarks to evaluate the productivity of physicians and clinics and how to address the flow and efficiency problems that impact the clinic's performance and profitability. You will learn how to calculate these benchmarks and apply them to your own practice, as well as how to implement solutions to improve your clinic's operations.

**Instructor(s):** Andrew T. Maller, MBA, COE; Elizabeth Monroe, MA, CPSS, PHR, COE

**A8-603 Your Documentation Checklist for Cataract Surgery**

ASOA Leadership and Strategic Management

Experienced

**Course Description**

Cataract extraction is the most frequent major surgical procedure of all medical specialties. After COVID receded, about 5 million cases are performed per year in the US. Consequently, there are big dollars involved and significant payor scrutiny. By some estimates, more than 50% of cases are not supported by chart documentation. Surgeons and ASCs are vulnerable. Medicare Administrative Contractors have a checklist of required elements. This course describes them and provides other useful hints to avoid problems.

**Instructor(s):** Mary Pat Johnson, COMT, COE, CPC, CPMA