MONDAY, AUGUST 14, 2017

7:00 – 8:00 am　　**Registration and Continental Breakfast** *(registration is also open from 5-7 pm Sun. August 13)*

8:00 – 8:15 am　　*Welcome & Introduction – Michael Melville, CEO, IntelliSoft*
IntelliSolution is the latest product offering that combines all the functionality of our credentialing, provider enrollment, and documentation management software along with the vast services of our CVO Division, IntelliCVO.

8:15 – 9:15 am　　*Motivational Speaker: The Funny Thing about Stress – Kay Frances, MBA*
Kay offers real-life, workable solutions to things people might struggle with including: dealing with difficult people, embracing change, choosing serenity over stress, problem-solving and letting go of what can't be controlled.

9:30 – 10:45 am　　**Breakout Sessions**

- **Application Mapping/iPop…***presenter: Christine Bergeron*
  A review of the tools and strategies for application mapping.
- **Reporting – Basic Design…***presenter: Katie Thuotte*
  Topics of this session include: adding and linking tables; adding columns and dynamic filters; adding static filters; defining data sort order; report layout design; running reports; and functions available after running a report.

11:00 am – 12:15 pm　**Breakout Sessions**

- **Tracking the Provider Enrollment Process with IntelliApp…**
  presenters: Monica Page and Christine Bergeron
  A review of the Application Tab, Action Types and Reporting tools to track the provider through the entire enrollment process and an overview of our newest product offering, IntelliSolution. This session will also include the process for enrolling your facility with payers.
- **Communication using IntelliCred/IntelliApp…***presenter: Shannon Brooks*
  This session will present an overview of the communication tools available in your system including: creating and customizing letters, setting up your email within the database, creating email and fax templates, and use of notifications.

12:15 – 1:30 pm   **Networking Lunch with IntelliSoft Group Experts**

1:45 – 3:00 pm   **Breakout Sessions**

- **IntelliReport – Advanced Features and Techniques…***presenter: Bob Goemans*
  Topics will include: special table linking; creating computed fields with table fields; creating computed fields with subqueries; advanced filtering techniques and report layouts; using the report SQL Query.
- **IntelliCred Re-credentialing…***presenters: Monica Page and Shannon Brooks*
  An overview of how providers due for re-credentialing are identified in IntelliCred, and steps to initiate re-credentialing as well as why this task is so important. With re-credentialing comes re-verification and so the discussion will also include verification types such as web links and webcrawlers NPDB, OIG and other customized verifications.

3:15 – 4:30 pm   **Breakout Sessions**

- **CAQH and Us** (session will include a member of CAQH's product team)
  presenters: Rachael LeBlanc, Christine Bergeron, Hassaan Sohail from CAQH
  This session will include an overview of the CAQH.xml Import Utility and how to use tools in IntelliCred to standardize information coming from CAQH into the system. This breakout also includes a discussion of new CAQH import features that give users the ability to validate the data coming from CAQH, to set required screens and data fields and to configure the creation of specific data types for desired screens. In addition, we will discuss features available in IntelliCred for creating CAQH Roster files that are provided to CAQH.
- **Automation: Notifications & Scheduler…***presenter: Mike Aha*
  Allow the system to take care of tedious tasks like running reports, notifying the provider of expiring credentials, and meeting reminders. In this session, we'll review the features and functions of the Scheduler and Notifications area of the software.

5:00 – 6:30 pm   **Networking Reception**

TUESDAY, AUGUST 15, 2017

7:30 – 8:30 am   **Continental Breakfast**

8:30 – 9:30 am   ***CAQH Guest Speaker – Sorin Davis, Managing Director of Industry Relations***
(This session will be worth 1 CEU)
With more than 35 years of experience in health insurance, healthcare management, benefits administration, sales and marketing, Sorin has served the healthcare industry from many perspectives.

9:45 – 11:00 am   **Breakout Sessions**

- **IntelliExport…***presenter: Bob Goemans*
  Functionality of the export module includes: export file properties, multi-row table formatting, practitioner retrieval queries, export field types, export field formats, field query filters, field query sort, record selector, null values export codes and link tables.
- **WebView…***presenter: Shannon Brooks*
  Setup, roll out and common pain points – especially when it comes to privileging and reappointment.

11:15 – 12:30 pm   **Breakout Sessions**

- **Are you Planning to Centralize your Credentialing?…**
  presenters: Michele Carpena, Monica Page and Shannon Brooks
  If your organization is thinking about centralized credentialing, or might be going through an acquisition, this breakout will present you with the particulars you need to consider prior to implementation.
- **IntelliCred Privileging Module…***presenters: Rachael LeBlanc and Eva Zona*
  This session will provide an overview of Privileging Module and how it is used to create clinical privilege procedure data and privilege criteria data. We will discuss how privilege data is added to the practitioner folder as well as how the practitioner data is updated when needed. We will also review some of the standard reports that are available from IntelliCred that help users to identify and manage practitioner privilege information.

12:30 – 1:30 pm   *Networking Lunch*

1:45 – 3:00 pm   **General Session – one session where we'll review two topics and wrap-up**

- **New Features that May Surprise You…***presenter: Rachael LeBlanc*
  Versions 15.2 and 15.3 have given us new functionality to improve your user experience. In this session, we'll review features related to processing applications, electronic signature, changing assigned users, search results, screen design, privilege merge forms, and much more!
  Cleaning/Maintaining your Database…*presenter: Katie Thuotte*
  Our experts will show you how proper and regular maintenance can improve the performance of your database.

3:15 – 3:30 pm   *Closing Remarks from David Aucoin, Executive Vice President of Operations*

Visit our "Ask the Expert" table
at any time during the entire program.

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ABOUT THE LOCATION

The Westin Copley Place is located in the center of America's "Most Walkable City" in the upscale Back Bay neighborhood. The hotel is a short walk from award-winning restaurants, shopping and area attractions including historic Fenway Park, the Boston Public Library, Newbury Street, Boston Public Garden's Swan Boats, the Isabella Stewart Gardner Museum, amphibious duck tours, the historic North End, Cheers, the Institute of Contemporary Art, Blue Hills Bank Pavilion featuring concerts and events, Boston Children's Museum, Faneuil Hall Marketplace, the Freedom Trail, New England Aquarium and the Museum of Fine Art. With multiple public transportation options close to the hotel, access to the city is a short ride away. Logan International Airport is just five miles outside the city.

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To register visit www.intellisoftgroup.com or
call Marcia Wessell at 603-318-7742