

# Home Health Bootcamp

July 13<sup>th</sup> -16<sup>th</sup> • 9:00 a.m. – 4:00 p.m. Daily

## At-a-Glance Schedule

<b>Day 1 — July 13</b>		<b>Clinical Foundations &amp; Compliance</b>	
9:00 – 9:10 a.m.	Welcome and Introduction	21 <sup>st</sup> Century Consultants	
9:10 – 10:40 a.m.	Launching & Growing Your Home Health Care Agency	21 <sup>st</sup> Century Consultants	
<i>10:40 – 10:50 a.m.</i>	<i>Break</i>		
10:50 – 11:20 a.m.	Skilled Patient Referrals & Let's Talk Pro-Bono	21 <sup>st</sup> Century Consultants	
11:20 – 11:40 a.m.	How to Write Orders and Frequency	21 <sup>st</sup> Century Consultants	
11:40 – 11:55 a.m.	Understanding Medicare's Definition of Skilled Intermittent Care	21 <sup>st</sup> Century Consultants	
<i>11:55 a.m. – 12:40 p.m.</i>	<i>Lunch</i>		
12:40 – 1:10 p.m.	How to Conduct a Skilled Home Health Admission	21 <sup>st</sup> Century Consultants	
1:10 – 1:40 p.m.	Emergency Preparedness and Disaster Planning	21 <sup>st</sup> Century Consultants	
1:40 – 2:10 p.m.	Conducting an Emergency Drill	21 <sup>st</sup> Century Consultants	
<i>2:10 – 2:25 p.m.</i>	<i>Break</i>		
2:25 – 2:55 p.m.	QAPI	21 <sup>st</sup> Century Consultants	
2:55 – 3:10 p.m.	Medicare Forms	21 <sup>st</sup> Century Consultants	
3:10 – 3:40 p.m.	Introduction to OASIS	21 <sup>st</sup> Century Consultants	
3:40 – 4:00 p.m.	Homebound Status	21 <sup>st</sup> Century Consultants	
<b>Day 2 — July 14</b>		<b>Completing Clinical &amp; Building Your Business</b>	
9:00 – 10:30 a.m.	Unshakable: The New Success Code	Kate Rose, Inc.	
10:30 – 11:15 a.m.	The Home Health Process	21 <sup>st</sup> Century Consultants	
<i>11:15 – 11:30 a.m.</i>	<i>Break</i>		
11:30 a.m. – 12:30 p.m.	Building Connections Through Marketing	21 <sup>st</sup> Century Consultants	
<i>12:30 – 1:30 p.m.</i>	<i>Lunch</i>		
1:30 – 2:30 p.m.	Sales Strategies for Success	21 <sup>st</sup> Century Consultants	
<i>2:30 – 2:45 p.m.</i>	<i>Break</i>		
2:45 – 3:45 p.m.	Optimizing Payor Sources	21 <sup>st</sup> Century Consultants	
<i>3:45 – 4:00 p.m.</i>	<i>Q&amp;A and Daily Wrap-Up</i>		
<b>Day 3 — July 15</b>		<b>Billing, Finance &amp; Survey Readiness</b>	
9:00 – 10:00 a.m.	Start Smart with Home Health Billing	SimiTree	
10:00 – 11:00 a.m.	Empowering Your Agency with EMR	HomeCare HomeBase	
<i>11:00 – 11:15 a.m.</i>	<i>Break</i>		
11:15 a.m. – 12:00 p.m.	An Overview of Business Insurance for Your Agency	VGM Insurance	

<i>12:00 – 12:45 p.m.</i>	<i>Lunch</i>	
12:45 – 1:45 p.m.	Financial Considerations in the Home Health Industry	Walters & Associates
1:45 – 2:45 p.m.	Home Health Survey Process Overview	CHAP
<i>2:45 – 3:00 p.m.</i>	<i>Break</i>	
3:00 – 4:00 p.m.	Developing an Effective Compliance Program	ACHC
<b>Day 4 — July 16</b>	<b>Employment, HR &amp; Business Planning</b>	
9:00 – 10:45 a.m.	Employment & Labor Law, FLSA	21 <sup>st</sup> Century Consultants
<i>10:45 – 11:00 a.m.</i>	<i>Break</i>	
11:00 a.m. – 12:30 p.m.	Workforce Management: Recruitment Through Separation	21 <sup>st</sup> Century Consultants
<i>12:30 – 1:30 p.m.</i>	<i>Lunch</i>	
1:30 – 2:30 p.m.	Privacy, Client Rights & BAAs and Fraud Prevention	21 <sup>st</sup> Century Consultants
<i>2:30 – 2:45 p.m.</i>	<i>Break</i>	
2:45 – 3:45 p.m.	Business Plan Development	21 <sup>st</sup> Century Consultants
<i>3:45 – 4:00 p.m.</i>	<i>Closing Remarks &amp; Q&amp;A</i>	

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## Session Overview

### Day 1 — Clinical Foundations & Compliance

#### 9:00 – 9:10 a.m. | Welcome and Introduction

*Presented by: Thomas Rose, CEO – 21st Century Health Care Consultants*

#### 9:10 – 10:40 a.m. | Launching & Growing Your Home Health Care Agency

*Presented by: Thomas Rose, CEO – 21st Century Health Care Consultants*

Topics: Setting Up Your Home Health Care Agency, Home Health Structure, Recruiting and Staffing, Staff Training and Specialization, Options for Outsourcing, Marketing and Business Development, Payor Sources, Influencing Referral Sources.

#### 10:40 – 10:50 a.m. | Break

#### 10:50 – 11:20 a.m. | Skilled Patient Referrals & Let's Talk Pro-Bono

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: What constitutes a skilled patient referral, understanding criteria for skilled service, review common conditions and services requiring skilled care, importance of quality and compliance. Explore the considerations for accepting or declining pro-bono patients in a new agency, sustainable care and compliance.

#### 11:20 – 11:40 a.m. | How to Write Orders and Frequency

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: Provide a clear understanding of how to write accurate and effective orders and determine appropriate visit frequency.

#### 11:40 – 11:55 a.m. | Understanding Medicare's Definition of Skilled Intermittent Care in Home Health

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: Defining skilled intermittent care, Medicare requirements for home health eligibility, examples of qualifying services.

#### 11:55 a.m. – 12:40 p.m. | Lunch

#### 12:40 – 1:10 p.m. | How to Conduct a Skilled Home Health Admission: Step by Step Guide

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: Understand the purpose of a skilled home health admission, focus on compliance, accuracy, safety, and efficiency with a focus on best practices.

#### 1:10 – 1:40 p.m. | Emergency Preparedness and Disaster Planning

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: Highlight the importance of emergency preparedness in the home health care setting; provide actionable steps that skilled home health agencies can take to ensure patient safety and continuity of care during emergencies, with a goal to protect patients and staff while ensuring continuity of care.

### **1:40 – 2:10 p.m. | Conducting an Emergency Drill**

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: Focus on regulatory compliance, patient care continuity, and risk reduction while equipping staff with knowledge and practical experience to handle emergencies, ensuring patient and staff safety.

### **2:10 – 2:25 p.m. | Break**

### **2:25 – 2:55 p.m. | QAPI**

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: Program basics to enhance care quality, ensure regulatory compliance, and promote patient safety; data collection and analysis; implementation of PIPs.

### **2:55 – 3:10 p.m. | Medicare Forms**

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: Advanced Beneficiary Notice of Noncoverage (ABN), Home Health Change of Care Notice (HHCCN), Notice of Medicare Non-Coverage (NOMNC), and Detailed Explanation of Non-Coverage (DENC).

### **3:10 – 3:40 p.m. | Introduction to OASIS**

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: The Outcome and Assessment Information Set (OASIS) is a critical component of Medicare's home health care program — a standardized data collection tool used to assess agencies' quality of care and ensure compliance with Medicare regulations. An introductory overview of its purpose, structure, implementation, and the benefits it provides to both patients and agencies.

### **3:40 – 4:00 p.m. | Homebound Status**

*Presented by: Clinical Manager – 21st Century Health Care Consultants*

Topics: This presentation breaks down the Medicare homebound eligibility requirement for home health services and what agencies need to document to support it.

# Day 2 — Completing Clinical & Building Your Business

## 9:00 – 10:30 a.m. | Unshakable: The New Success Code

*Presented by: Kate Rose – Kate Rose, Inc.*

Website: [www.KateRoseUnleashed.com](http://www.KateRoseUnleashed.com)

Topics: Empowering entrepreneurial professionals in home health care to lead with authenticity, clarity, and resilience. Practical tools to overcome fear, prevent burnout, and realign with a deeper sense of purpose. Participants walk away with a renewed vision of success rooted in truth and sustainable leadership.

## 10:30 – 11:15 a.m. | The Home Health Process

*Presented by: TBD, Clinical Manager – 21st Century Health Care Consultants*

Topics: A step-by-step look at the process and patient experience from referral through discharge.

## 11:15 – 11:30 a.m. | Break

## 11:30 a.m. – 12:00 p.m. | Building Connections Through Marketing

*Presented by: Lea Chittenden, VP Revenue Growth & Client Success – 21st Century Health Care Consultants*

Topics: Branding, Website, SEO, Google Business Listing, Paid Ads, Social Media, Reviews.

## 12:00 p.m. – 12:30 p.m. | Market Research & Analysis

*Presented by: Lea Chittenden, VP Revenue Growth & Client Success – 21st Century Health Care Consultants*

Topics: Understanding the markets in which your agency operates within is critical and this presentation will provide a brief overview of publicly available data and how it can be used to create a data driven growth strategy

## 12:30 – 1:30 p.m. | Lunch

## 1:30 – 2:30 p.m. | Sales Strategies for Success

*Presented by: Lea Chittenden, VP Revenue Growth & Client Success – 21st Century Health Care Consultants*

Topics: Essential sales skills to drive growth through ethical outreach, relationship-building, and market targeting; understanding referral sources, delivering value-based messaging, and maintaining compliance. Practical strategies for closing referrals, addressing objections, and sustaining momentum through community partnerships and patient-focused care.

## 2:30 – 2:45 p.m. | Break

## 2:45 – 3:45 p.m. | Optimizing Payor Sources

*Presented by: Thomas Rose, President and CEO – 21st Century Health Care Consultants*

Topics: Importance of diversifying your agency's payor sources and measuring and tracking them individually for their respective profitability; high-level overview of the payor sources available to home health agencies and the benefits and challenges of each.

*3:45 – 4:00 p.m. | Q&A and Daily Wrap-Up*

# Day 3 — Billing, Finance & Survey Readiness

## 9:00 – 10:00 a.m. | Start Smart with Home Health Billing

*Presented by: Lynn Labarta, B.S., VP, Post Acute Revenue Cycle Management – SimiTree*

Phone: (888) 370-3339 Ext. 101 | Email: [lynnlabarta@simitreehc.com](mailto:lynnlabarta@simitreehc.com)

Topics: Detailed billing process for Medicare claims; tips on how to avoid revenue loss; timing on when your first payment will be released.

## 10:00 – 11:00 a.m. | Empowering Your Agency with EMR: Selection, Implementation, and Success Strategies

*Presented by: HomeCare HomeBase*

Topics: Anticipating growth, multiple business lines; managing employee records, insurance/prior auth/scheduling compliance; OASIS, POC and documentation compliance; tips and strategies for success.

## 11:00 – 11:15 a.m. | Break

## 11:15 a.m. – 12:00 p.m. | An Overview of Business Insurance for Your Agency

*Presented by: Jackson Frericks, Insurance Producer – VGM Insurance*

Phone: (319) 774-7589 | Email: [Jackson.Frericks@vgm.com](mailto:Jackson.Frericks@vgm.com)

Topics: General & Professional Liability, Workers Compensation, Claim Examples.

## 12:00 – 12:45 p.m. | Lunch

## 12:45 – 1:45 p.m. | Financial Considerations in the Home Health Industry

*Presented by: Doug Walters, CPA, Managing Partner – Walters & Associates, CPAs*

Phone: (941) 756-0700 | Email: [doug@waltersaccounting.com](mailto:doug@waltersaccounting.com)

Topics: S-Corp Election; productivity standards; workers comp; understanding requirements; establishing a bookkeeping system.

## 1:45 – 2:45 p.m. | Home Health Survey Process Overview: Top Deficiencies and Strategies for Compliance

*Presented by: Shannon Dorsey Dunlap, MBA, LRTR, NHA, HCS-C, CHPC, CHC, Director of Accreditation – Community Health Accreditation Partner (CHAP)*

Phone: (202) 467-1701 | Email: [Shannon.dorsey-dunlap@chapinc.org](mailto:Shannon.dorsey-dunlap@chapinc.org)

Topics: Overview of Medicare survey processes, regulatory updates applicable to Home Health surveys, and the difference between Conditional Level and Standard Level deficiencies; top survey issues impacting home health agencies; survey readiness strategies for ongoing, organization-wide survey compliance; brief overview of CHAP and the benefits of CHAP accreditation.

## 2:45 – 3:00 p.m. | Break

## 3:00 – 4:00 p.m. | Developing an Effective Compliance Program

*Presented by: Survey Operations – Accreditation Commission for Health Care (ACHC)*

Phone: (855) 937-2242 | Email: [customerservice@achc.org](mailto:customerservice@achc.org)

Topics: Understand the importance of compliance programs; identify key components of an effective compliance program; learn strategies for implementation and monitoring.

# Day 4 — Employment, HR & Business Planning

## **9:00 – 10:45 a.m. | Employment & Labor Law, FLSA**

*Presented by: Thomas Rose, President and CEO – 21st Century Health Care Consultants*

Topics: Federal and state employment law framework for home care agencies; FLSA minimum wage, overtime, and recordkeeping requirements.

## **10:45 – 11:00 a.m. | Break**

## **11:00 a.m. – 12:30 p.m. | Workforce Management: Recruitment Through Separation**

*Presented by: Thomas Rose, President and CEO – 21st Century Health Care Consultants*

Topics: Developing compliant job descriptions and lawful interview protocols; required components for compliant employee personnel files; establishing clear performance expectations and standards; conducting lawful involuntary terminations with proper documentation; unemployment insurance claims process and employer response strategies.

## **12:30 – 1:30 p.m. | Lunch**

## **1:30 – 2:30 p.m. | Privacy, Client Rights & Business Associate Agreements and Healthcare Fraud Prevention**

*Presented by: Thomas Rose, President and CEO – 21st Century Health Care Consultants*

Topics: HIPAA Privacy Rule, Security Rule, and Breach Notification Rule; building a HIPAA compliance program for daily operations; federal protections and state-mandated client rights for non-skilled home care; when BAAs are required and identifying vendors who need them; Physician Self-Referral Law (Stark Law) — strict liability standard.

## **2:30 – 2:45 p.m. | Break**

## **2:45 – 3:45 p.m. | Business Plan Development**

*Presented by: Thomas Rose, President and CEO – 21st Century Health Care Consultants*

Topics: How to develop a business plan to be the road map for your organization, your growth, and your success.

## **3:45 – 4:00 p.m. | Closing Remarks & Q&A**