THE TIDES ARE CHANGING!

NAME
National Alliance for Medicaid in Education, Inc.

10TH ANNUAL CONFERENCE
October 9th - 12th 2012

Providence, Rhode Island
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On behalf of NAME’s Board of Directors and Committee Chairpersons, WELCOME to the 10th Annual Conference of the National Alliance for Medicaid in Education (NAME, Inc). Our Conference theme this year, “The Tides Are Changing!” aligns so well with what we know is occurring in our unique world of Medicaid and Special Education: Change! The 2012 Conference Committee has developed an outstanding program that we think will prepare you for the ebb and flow of your work every day: of students, clinicians and staff, and of course, the federal, state and local requirements you need to understand to be compliant. They have designed a busy four days that we hope will be filled with learning, innovating, networking and a bit of relaxing while you are in New England too! We hope many of you have planned to arrive early or stay after the Conference adjourns to explore this beautiful part of the country.

To prepare for the Conference, take a look at this detailed Program and find those sessions that can inform, motivate and energize you. The “Academy” kicks off the week on Tuesday afternoon, and we wrap up with the Annual Membership Meeting and installation of a new Board of Directors. In between those exciting events, whether you are a new participant or a grizzled veteran, we hope you see and understand the intersection of Medicaid and Special Education under a brighter light and with a sharper focus. And maybe, when you are back in the office, you will be able to apply some or all of what you learned to your School Based Services Program; or write better policy; conduct stronger trainings; increase efficiencies and improve outcomes; or more accurately design, evaluate, or otherwise “Change the Tides” for the better, in your work environment.

As you know by now, we instituted one easy registration fee that includes all the sessions during the week, including Tuesday’s Academy and Town Hall Meetings. During the rest of the week you will have access to a wide variety of our popular Nugget sessions that have been expanded from 20 minutes to 40 minutes each; a diverse selection of 90-minute breakout sessions that provide more in-depth analyses of issues; the annual general session presentations by our federal partners from the Centers for Medicare and Medicaid Services (CMS) and Department of Education; and several other general sessions featuring expert leaders in the fields of health care and special education, from both delivery and policy perspectives.

The Conference Committee has planned social and networking events including a reception on Wednesday; a luxury coach bus trip to Newport for some ocean time on Thursday, or if you prefer, that same night, see the Broadway play ‘Catch Me if You Can’, by walking a few blocks from our beautiful Providence Biltmore Hotel. Please take advantage of daily breaks between sessions and meal times to introduce yourself to other attendees and to catch up with old friends or take a walk along the river for some fresh air.

Bids for the Charity fundraiser Silent Auction open on Tuesday and continue through Friday morning. The local charity selected this year is Impossible Dream, which is a local nonprofit organization dedicated to making dreams come true for children and youth with chronic conditions. Don’t forget to purchase and bring enticing items from your state, so you and others may then bid often and high to support this wonderful local charity. WOW!! Will you be able to keep up with all this learning? Well, we think you can!
So, on behalf of the small army of hard-working NAME volunteers who have spent all year developing this incredible, can’t miss event for you, please enjoy Providence and savor the educational and networking opportunities you experience these four days. When you see me in the Biltmore, please stop and say hello, and share with me your connection to NAME and how you think we can better serve you.

And finally, after you’ve completed your evaluation of this year’s Conference with suggestions for improving next year’s event, you can start planning to attend next year! I very much look forward to seeing you in Michigan, on October 8-11, 2013 for NAME’s 11th Annual Conference in the beautiful city of Grand Rapids at the Amway Grand Plaza Hotel.

Sincerely,

Jane E. Reagan (Michigan)
Conference Agenda

Tuesday, October 9, 2012

Noon-6:00 pm  | Registration | 2nd Floor Balcony
2:00 pm-5:30 pm | **Introduction to School-Based Medicaid (The Academy):**
                | Experts in Education (IDEA) & Medicaid provide an introductory overview
                | *Jane Reagan, (MI), Richard Brennan (WV)*
                | *Jennifer Haase (MI)*
2:00 pm-5:30 pm | 2nd Floor – Garden Room
Noon-6:00 pm  | Exhibit Set-Up | 17th Floor – L’Apogee
Noon-6:00 pm  | Auction Items Drop-Off | 2nd Floor - Balcony
6:30 pm-8:00 pm | **Regional Town Hall Meetings:**
                | *Regional Networking and Sharing*
                | **Region 1**
                | Connecticut, Massachusetts, Maine, New Hampshire,
                | New Jersey, New York, Pennsylvania, Rhode Island,
                | Vermont, Delaware, District of Columbia, Kentucky,
                | Maryland, North Carolina, South Carolina,
                | Tennessee, Virginia, West Virginia
                | **Region 2**
                | Alabama, Arkansas, Florida, Georgia, Louisiana,
                | Mississippi, Oklahoma, Texas, Puerto Rico, US Virgin Islands,
                | Illinois, Indiana, Iowa, Michigan, Minnesota,
                | Missouri, Ohio, Wisconsin
                | **Region 3**
                | Arizona, Colorado, Kansas, Montana, Nebraska, New Mexico,
                | North Dakota, South Dakota, Utah,
                | Wyoming, Alaska, California, Hawaii, Idaho, Nevada,
                | Oregon, Washington
Wednesday, October 10, 2012

7:30 am–5:00 pm    Registration
                      17th Floor
7:00 am–5:00 pm    Exhibits
                      17th Floor – L’Apogee
7:00 am–5:00 pm    Charity Silent Auction
                      17th Floor – Outside Renaissance
7:00 am–8:30 am    Breakfast
                      17th Floor – Buffet L’Apogee

8:30 am–9:15 am    **General Session:**
                      Welcome
                      Denise Achin, Immediate Past President & Conference Co-Chair
                      17th Floor – Grand Ballroom
                      Greetings from Rhode Island
                      Elena Nicolella, Medicaid Director
                      David Abbott, Deputy Commissioner/General Counsel (RIDE)
                      NAME Update
                      Jane Reagan, NAME President
                      Conference Overview
                      Denise Achin, Conference Co-Chair

9:15 am–10:45 am   **Opening Keynote Address:**
                      Endless Abilities
                      Zachary Bastian, Tripp Clemens, Will Humphrey
                      17th Floor – Grand Ballroom
10:45 am–11:00 am  Morning Break
                      17th Floor – L’Apogee
11:00 am–12:15 pm  **General Session:**
                      ACA, ACO and PCMH?: How to Work with a Tidal Change in the US Health Care System
                      Dr. David Keller, Clinical Associate Professor of Pediatrics, Senior Policy Analyst, UMass Medical School & Associate Medical Director for the Office of Clinical Affairs at the Massachusetts Medicaid Agency
                      17th Floor – Grand Ballroom

12:30 pm–1:30 pm   **Charity Luncheon:**
                      The Impossible Dream
                      17th Floor – Grand Ballroom
1:35 pm–3:05 pm    **Breakout Sessions:**
                      Minimize Hassles: Tools & Resources for Medicaid-Participating LEAs
                      Larry Bass (IN), Kathleen Heiss (IN), Tracy Brunner (IN)
                      2nd Floor – Garden Room
Successful Operation of the School Medicaid Program
Harold Daniels (FL)
2nd Floor – State Suite B

Managing Your School Based Medicaid Billing Program-An Ocean of Information to Help you Navigate the Changing Tides
Bryan Hawkem (MA), Elaine Lerner (NJ), Steven Wright (NY),, Kathy Cummins Merry (MI), Michelle Simmons (MA)
17th Floor – Grand Ballroom

Turning the Tide on the State’s Direct Services Billing “Customer Experience” for LEA
Rick Jacobs (IL), Ian Doughty (IL)
17th Floor - Renaissance

3:05 pm-3:20 pm Afternoon Break
17th Floor – L’Apogee

3:20 pm-4:50 pm Breakout Sessions:
Minimize Hassles: Tools & Resources for Medicaid-Participating LEAs
Larry Bass (IN), Kathleen Heiss (IN), Tracy Brunner (IN)
2nd Floor – Garden Room

Successful Operation of the School Medicaid Program
Harold Daniels (FL)
2nd Floor – State Suite B

Anything You Can Do, I Can Do Better
Donna Pletcher (MI), Kathy Cummins Merry (MI)
17th Floor – Grand Ballroom

Turning the Tide on the State’s Direct Services Billing “Customer Experience” for LEAs
Rick Jacobs (IL), Ian Doughty (IL)
17th Floor - Renaissance

5:00 pm-7:00 pm Welcome Reception
3rd Floor - Terrace
Thursday, October 11, 2012

7:30 am–5:00 pm  Registration  17th Floor Outside Elevators
7:00 am-5:00 pm  Exhibits  17th Floor – L’Apogee
7:00 am-5:00 pm  Charity Silent Auction  17th Floor – Outside Renaissance
7:00 am-8:00 am  Breakfast  17th Floor – Buffet L’Apogee
8:00 am-9:00 am  **General Session:**
Washington Update from NAME Partners
Bruce Hunter, American Association of School Administrators (AASA), Nancy Reder, National Association of State Directors of Special Education (NASDSE), Luann Purcell, Council of Administrators of Special Education (CASE)
17th Floor – Grand Ballroom
9:00 am-10:15 am  **General Session:**
RI Expert Pane: Health Care Reform in the Ocean State
Deb Florio, RI Department of Health & Human Services, Angela Sherwin, RI Office of the Health Insurance Commission
17th Floor – Grand Ballroom
10:15 am-10:30 am  Morning Break  17th Floor – L’Apogee
10:30 am-12:30 pm  **General Session:**
Annual Federal Medicaid Update and Discussion
US Health & Human Services (HHS) Centers for Medicare & Medicaid Services
17th Floor – Grand Ballroom
12:30 pm-1:30 pm  Lunch  17th Floor – L’Apogee
1:30 pm-2:15 pm  **General Session:**
Annual Federal Education Update and Discussion
US Department of Education (DOE), Office of Special Education and Rehabilitation (OSERS) Office of Special Education Program (OSEP)
17th Floor – Grand Ballroom
2:15-2:30 pm  Afternoon Break  17th Floor – L’Apogee
2:30 pm-4:30 pm  **Nugget Sessions (These sessions repeat three times during this time slot):**
Measuring the Success of Your School District’s Medicaid Program
Bob Bundy (AR)
Utilizing School Psychologists: Ensure Compliance and High Quality Service Delivery
Kelly Vaillancourt (VA), John Kelly PhD (NY) 2nd Floor – State Suite A

The Changing Tides of Medicaid in Education: NAME National Survey Results
Becky Stoddard (KY), Rick Jacobs (IL), Jim Donoghue, (IA) Rena Steyaert (MT), Alicia Neumann (CA) 2nd Floor – State Suite B

Helping with the Cost of Health Care and Medications: Needy Meds
Richard Sagall, MD (ME) 2nd Floor – State Suite C

Health in Mind: Improving Education through Wellness
Rochelle Davis (IL) 2nd Floor – Garden Room

Riding Virginia’s Technology Way: Delivering Services Via Telepractice
Marie Ireland (VA), Janice Brannon (VA) 17th Floor – Renaissance

Changing Tides & Changing Time Studies
Amy Edwards (VA), Mary Hall (VA), Susan Fischer (MA) 17th Floor – Grand Ballroom

How MA is Utilizing Technology to Respond to the Change of its School Based Claiming Program
Rumi Pavlova (MA), Janice Axelrod (MA), Teresa Pastore (MA) 17th Floor – Salon 2

How MA is Utilizing Technology to Respond to the Change of its School Based Claiming Program
Rumi Pavlova (MA), Janice Axelrod (MA), Teresa Pastore (MA) 17th Floor – Salon 2

Medicaid and the Schools after the Election: Will We Survive?
Greg Morris (CA), John Hill (IN) 18th Floor – Salon 5/6

4:45 pm - 10:00 pm Social Event: Newport Bus Tour
Advance Registration Required Hotel Lobby

7:00 pm Social Event: Catch Me If You Can
Hotel Lobby

7:30 pm Show
Providence Performing Arts Center (PPAC)
Advance Registration Required
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<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:00 am-9:45 am</td>
<td>Silent Auction (Last Chance for Bidding)</td>
<td>17th Floor – Outside Renaissance</td>
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<td>7:00 am-8:30 am</td>
<td>Breakfast</td>
<td>17th Floor – Buffet L’Apogee</td>
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<td>8:30 am-9:15 am</td>
<td><strong>Regional Town Hall Reflections-Next Steps:</strong></td>
<td>17th Floor – Renaissance</td>
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<td><strong>Region 1</strong></td>
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<td></td>
<td>Connecticut, Massachusetts, Maine, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Delaware, District of Columbia, Kentucky, Maryland, North Carolina, South Carolina, Tennessee, Virginia, West Virginia</td>
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<td><strong>Region 2</strong></td>
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<td>Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, Oklahoma, Texas, Puerto Rico, US Virgin Islands, Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Ohio and Wisconsin</td>
<td>17th Floor – Salon 2</td>
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<td><strong>Region 3</strong></td>
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<td></td>
<td>Arizona, Colorado, Kansas, Montana, Nebraska, New Mexico, North Dakota, South Dakota, Utah, Wyoming, Alaska, California, Hawaii, Idaho, Nevada, Oregon and Washington</td>
<td>18th Floor – Salon 6</td>
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<td>9:15 am-10:00 am</td>
<td>All Regions Report</td>
<td>17th Floor – Grand Ballroom</td>
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<td>10:00 am-10:15 am</td>
<td>Morning Break</td>
<td>17th Floor – L’Apogee</td>
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<td>10:15 am-10:30 am</td>
<td>Silent Auction Winners Announced</td>
<td>17th Floor – Grand Ballroom</td>
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<td>10:30 am-11:45 am</td>
<td><strong>NAME Annual Meeting: Committee Reports &amp; Election Results</strong></td>
<td>17th Floor – Grand Ballroom</td>
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<td>11:45 – 12:00 pm</td>
<td>Passing the Gavel, Call to Michigan 2013</td>
<td>17th Floor – Grand Ballroom</td>
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<td><em>Jane Reagan (MI), Outgoing President</em></td>
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<td><em>Steven Wright (NY), Incoming President</em></td>
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<td>12:00 pm</td>
<td>Conference Concludes</td>
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<td>12:30 am - 1:45 pm</td>
<td>Public Board Meeting &amp; Leadership Team Lunch</td>
<td>17th Floor – Renaissance</td>
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<td>2:00 pm-5:00 pm</td>
<td>Long Range Planning Meeting (Leadership Team and invited guests)</td>
<td>17th Floor – Renaissance</td>
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Saturday, October 13, 2012

8:00 am-4:00 pm  Long Range Planning Meeting (Leadership Team only)  17th Floor - Renaissance
SESSION DETAILS

Tuesday, October 9, 2012

Introduction to School-Based Medicaid (2:00 pm-5:30 pm)
If you are new to Medicaid in Education, this popular Pre-Conference feature is for you! It is broad in scope and packed with details while small enough to allow for meaningful discussions. You will gain a basic understanding about Medicaid and Special Education, including history and federal regulations. In addition, experienced presenters will share how best to integrate both worlds in a school setting. The Academy has much to offer new staff from State Agencies, LEAs, vendors and partner organizations who want to understand the unique nuances and relationships of these two federal programs and how it works locally.

Objectives: Participants will be able to:
1) Describe at least three of the primary features of the Medicaid Program that are pertinent to all states in the country
2) Explain at least three of the primary features of the federal IDEA law as it applies to Special Education programs in the country’s public schools
3) Discuss three considerations for developing a school-based billing program

Location: 2nd Floor – Garden Room
Speakers: Medicaid: Richard Brennan (WV), Special Education: Jane Reagan (MI)
Local Level: Jennifer Haase (MI)

Regional Town Hall Meetings (6:30 pm-8:00 pm)
Each year the NAME Conference seems to fly by, and in spite of several opportunities during the week to network with our peers, we often wish we’d spent more time discussing major issues with each other. This session intends to provide you with just that chance. Organized by the three geographic regions, attendees will be encouraged to reflect on issues or events in their state programs, bring up new topics for consideration, or review those that arise every year. Several questions will be available for each region to consider. Each Regional meeting will be led by members of the NAME Board of Directors, and the recommendations for next steps and/or action will be reported out to the entire group later in the conference. Bring your creative ideas, data, concerns, suggestions for action, stories of success, and actively participate!

Locations: Region 1: 2nd Floor Garden Room
Region 2: 2nd Floor State Suite A
Region 3: 2nd Floor State Suite B

Wednesday, October 10, 2012

General Session (11:00 am – 12:15 pm)
ACA, ACO and PCMH?: How to Work with a Tidal Change in the US Health Care System
The ongoing change in the US Health Care system poses special problems to those working for collaboration between state Medicaid programs and public schools systems. Dr. Keller, a pediatrician who has been engaged in the process at both the Federal and State levels, will present a review of the changes envisioned under the Affordable Care Act, with special attention to the many choices currently being made regarding implementation by each State in the country. He will focus on the opportunities for collaboration created by Medicaid expansion, alternative payment models such as Health Homes, Patient-Centered Medical Homes and Accountable Care Organizations and the implementation of home visiting
programs to facilitate early intervention, all of which are likely to occur over the next few years. Finally, he will conclude with practical advice for state policy makers and local school districts in the current dynamic political environment.

**Location:** 17th Floor Grand Ballroom  
**Speaker:** Dr. David Keller (MA)

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**Breakout Sessions (1:35 pm – 3:05 pm)**

**Minimize Hassles: Tools & Resources for Medicaid-Participating LEAs**  
This session offers suggestions to simplify local educational agency (LEA) Medicaid claiming procedures. It includes examples of forms, processes and resources that can be adapted for local use.

**Objectives:** Participants will be able to:
1) Identify strategies to simplify local schools’ administration and oversight of school-based Medicaid claiming
2) Adapt sample forms and other tools for local school district use
3) Access state and national level resources for Medicaid-participating schools

**Location:** 2nd Floor – Garden Room  
**Speakers:** Larry Bass (IN), Kathleen Heiss, ATP (IN), Tracy Brunner (IN)

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**Successful Operation of the School Medicaid Program**  
Operating a successful Medicaid program in the nation’s 8th largest district.

**Objectives:** Participants will:
1) Know how to operate a successful and compliant Medicaid program
2) Understand the school providers are the key to the program and must buy into it
3) Understand that the returns to the district are related to the investment of the district

**Location:** 2nd Floor – State Suite B  
**Speaker:** Harold D. Daniels (FL)

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**Managing Your School Based Medicaid Billing Program-An Ocean of Information to Help you Navigate the Changing Tides**  
This session will take the form of a facilitated panel discussion amongst your colleagues from AZ, NY, NJ and MI. Come learn about how these states have succeeded in maximizing their SBS revenue, managing compliance/program integrity, implementing new policy, and maintaining communication between agencies and LEAs, through challenging economic times of constrained resources! Multiple key aspects of FFS, MAC, and cost settlement policy and process will be discussed. The panelists from these 4 large states bring decades of experience to their programs, and will share their lessons learned and best practices for all program stakeholders.

**Objectives:** Participants will be able to:
1) Understand successful approaches to program integrity
2) Learn how new policies are being successfully implemented, including changes with respect to ICD10 and NPI
3) Understand how to successfully use a stakeholder steering committee to improve communication between agencies
4) Compare/contrast four programs, including covered services and approach to cost

**Location:** 17th Floor – Grand Ballroom
Turning the Tide on the State's Direct Services Billing "Customer Experience" got LEAs
Navigating the ever-changing requirements of direct services reimbursement requires the ability to successfully maneuver around the challenges of conflicting guidance, competing priorities, interagency coordination and rising demands with falling resources. One state that embraced the tide of change and set a course towards transformation to improve third party billing for its LEAs is Minnesota.

Objectives: Participants will be able to:
1) Identify and describe key approaches that states can use to turn the tide on the effectiveness and financial performance of their LEA direct services reimbursement programs.
2) Understand how knowledge transfer and best practices can "raise the water line" for all LEAs and create currents of continuous improvement.
3) Learn how statistical modeling can turn unmanageable amounts of data into meaningful and actionable recommendations to simplify administrative processes to improve state oversight and improve the LEA "customer experience."

Location: 17th Floor – Renaissance
Speakers: Rick Jacobs (IL), Ian Doughty (IL)

Breakout Sessions (3:20 pm – 4:50 pm)

Minimize Hassles: Tools & Resources for Medicaid-Participating LEAs
This session offers suggestions to simplify local educational agency (LEA) Medicaid claiming procedures. It includes examples of forms, processes and resources that can be adapted for local use.

Objectives: Participants will be able to:
1) Identify strategies to simplify local schools’ administration and oversight of school-based Medicaid claiming.
2) Adapt sample forms and other tools for local school district use.
3) Access state and national level resources for Medicaid-participating schools.

Location: 2nd Floor – Garden Room
Speakers: Larry Bass (IN), Kathleen Heiss, ATP (IN), Tracy Brunner (IN)

Successful Operation of the School Medicaid Program
Operating a successful Medicaid program in the nation’s 8th largest district.

Objectives: Participants will:
1) Know how to operate a successful and compliant Medicaid program.
2) Understand the school providers are the key to the program and must buy into it.
3) Understand that the returns to the district are related to the investment of the district.

Location: 2nd Floor – State Suite B
Speaker: Harold D. Daniels (FL)

Turning the Tide on the State's Direct Services Billing "Customer Experience" got LEAs
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3) Learn how statistical modeling can turn unmanageable amounts of data into meaningful and actionable recommendations to simplify administrative processes to improve state oversight and improve the LEA “customer experience.”

**Location:** 17th Floor – Renaissance
**Speakers:** Rick Jacobs (IL), Ian Doughty (IL)

**Anything You Can Do, I Can Do Better**
This session is designed for those participants thinking about developing and implementing their own SBS billing software system.

**Objectives:** Participants will be able to:
1) Understand the types of activities and staffing involved in implementing SBS Medicaid data entry and billing software
2) Weigh the Pros and Cons of an in-house data entry and/or billing system
3) Gain some perspective about the inevitable software development challenges

**Location:** 17th Floor – Grand Ballroom
**Speakers:** Donna Pletcher (MI), Kathy Cummins Merry (MI)

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**Thursday, October 11, 2012**

**General Session (8:00 am -9:00 am)**

**Washington DC Updates from NAME Partners**
Representatives from the American Association of School Administrators (AASA), National Association of State Directors of Special Education (NASDSE) and Council of Administrator of Special Education (CASE) talk about current policies and potential changes that may have positive and negative effects on School-Based Medicaid reimbursements and more.

**Location:** 17th Floor – Grand Ballroom
**Speakers:** Bruce Hunter (DC), Nancy Reder (DC), Luann Purcell (DC)

**General Session (9:00 am - 10:15 am)**

**RI Expert Panel: Health Care Reform in the Ocean State**
As a national leader in implementing the Affordable Care Act, Rhode Island has made significant progress toward improving access to affordable health insurance coverage for its residents. This session will cover (1) an overview of key elements and the timeline of health reform, (2) Rhode Island’s approach to implementation, including establishing a state-based Health Benefits Exchange, close collaboration between Medicaid and the Exchange, and streamlining eligibility and enrollment in public coverage programs, and (3) the role that educators can play in health reform implementation.
**Location:** 17th Floor – Grand Ballroom  
**Speakers:** Deb Florio (RI), Angela Sherwin (RI)

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**General Session (10:30 am - 12:30 pm)**

**Annual Federal Medicaid Update and Discussion**  
It is tradition at the NAME Annual Conference to have staff from the federal Centers for Medicare and Medicaid Services provide both background and updates on each of their various specialty areas that have relevance to SBS. In addition, the staff will address topics and questions submitted by NAME members this Summer, and take additional questions from the audience, time permitting.

**Location:** 17th Floor – Grand Ballroom  
**Speakers:** Onsite: Mary Cieslicki, Rich McGreal, Participating remotely: Sharon Brown, Jason Frandson, Judi Wallace

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**General Session (1:30 pm - 2:15 pm)**

**Annual Federal Education Update and Discussion**  
In maintaining the tradition of federal agency updates and summaries of hot topics, for the fourth consecutive year, the federal Office of Special Education and Rehabilitation Services (OSERS) will provide us with current news from the U.S. Department of Education.

**Location:** 17th Floor – Grand Ballroom  
**Speakers:** Participating remotely (OSERS): Jennifer Sheehy

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**Nugget Sessions: These sessions repeat three times during this time slot (2:30 pm - 4:30 pm)**

**Measuring the Success of Your School District’s Medicaid Program**  
You can see how much money your Medicaid program is bringing into your school district. But how do you know if you’re receiving all the money you should? What should you be reviewing to identify issues that might be impacting your revenue? This session will discuss best practices for analyzing your Medicaid program performance including questions to ask and data to review.

**Objectives:** Participants will be able to:  
1) Have an understanding of how and why to analyze their Medicaid program  
2) Know what data to review to measure their program’s success  
3) Know what questions to ask to uncover potential issues impacting their revenue recovery

**Location:** Boardroom  
**Speaker:** Bob Bundy (AR)

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**Utilizing School Psychologists: Ensure Compliance and High Quality Service Delivery**  
Description: This presentation will describe how school psychologists can help schools design effective service delivery models to ensure that federal mandates are being met without sacrificing efficient, cost-effective, and high quality service delivery. We will review the ways that schools can utilize their school psychologist to design effective service delivery systems at both the system and individual level to ensure that the needs of children and youth with disabilities are met and that they have the best possible educational
outcomes. We will also review emerging and existing Medicaid policies as it relates to school based service delivery and reimbursement.

**Objectives:** Participants will be able to:
1) Learn the role of the school psychologist as it relates to meeting mandates of ESEA and IDEA
2) List three ways a school can utilize their school psychologist to ensure positive outcomes for students with disabilities
3) Gain an understanding of Medicaid policies related to qualified providers in the school setting

**Location:** 2nd Floor - State Suite A  
**Speakers:** Kelly Vaillancourt (VA), John Kelly PhD (NY)

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**The Changing Tides of Medicaid in Education: NAME National Survey Results**
As the tides of Medicaid in education change, data provides one of the best methods to observe where you have been and discover where you may be headed. Get the latest data as reported by states on NAME’s 2011 biennial survey. Members from the Education and Research Committee Data Work Group will share a “nugget” or two from the 2011 survey, describe plans for the 2013 survey report, explain trending data and discuss issues important to attendees

**Objectives:** Participants will be able to:
1) Update their knowledge of at least one statistic related to billing Medicaid for School-based services
2) Discuss plans for how NAME proposes to provide trend data in the future
3) List three issues that are important to session participants

**Location:** 2nd Floor – State Suite B  
**Speakers:** Becky Stoddard (KY), Rick Jacobs (IL), Jim Donoghue (IA), Rena Steyaert (MT), Alicia Neumann (CA)

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**Helping with the Cost of Health Care and Medications**
Help is available for those who are having problems paying for medications and other health care costs. In this presentation you will learn of the many different types of help and how to easily and quickly determine the assistance available.

**Objectives:** Participants will be able to:
1) Quickly find and determine appropriate pharmaceutical assistance programs
2) Identify other alternative programs based on diagnosis
3) Understand the application process

**Location:** 2nd Floor - State Suite C  
**Speaker:** Richard J. Sagall, MD (ME)

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**Health in Mind: Improving Education through Wellness**
During this presentation, attendees will hear about strategies for immediate, practical changes at the federal, state and local levels to help close the achievement gap and create a healthy future for all children. This will include strategies for reducing barriers to school health services, integrating health and wellness into professional development programs for teachers and principals, and integrating health and wellness into educational data systems and school accountability and recognition programs. Healthy Schools Campaign will share their recent efforts to work with the U.S. Department of Education and the U.S. Department of Health and Human Services to support healthier school environments and discuss
innovative examples of local efforts to integrate health and wellness into education policy and practice.

Objectives: Participants will be able to:
1) List at least three examples of innovative efforts to integrate health and wellness into education policy and practice
2) Understand key barriers to integrating health and wellness into education policy and practice
3) Identify strategies for addressing these barriers

Location: 2nd Floor - Garden Room
Speaker: Rochelle Davis (IL)

Riding Virginia's Technology Wave: Delivering Services via Telepratice
This presentation will provide an overview of recent changes to Virginia's Medicaid system allowing telepractice as a reimbursable service delivery method for the delivery of speech-language therapy. Billing for personal care assistants, equipment needs, coding, HIPPA compliance, and lessons learned from a 2 year pilot program will be shared. Examples from other states moving towards telepractice will also be shared.

Objectives: Participants will be able to:
1) Identify areas of current state practice and licensure to address when advocating for telepractice in your state
2) Identify federal modifier to use when coding telepractice sessions
3) List basic equipment needs for service delivery

Location: 17th Floor - Renaissance
Speakers: Marie C. Ireland (VA), Janice Brannon (VA)

Changing Tides & Changing Time Studies
Since the start of Administrative Claiming and Time Studies in Virginia in 2003, the process has changed several times. Some changes have been small and some changes have been significant. These experiences have resulted in a streamlined, non-intrusive time study process

Objectives: Participants will be able to:
1) Understand the purpose of time studies
2) Understand the random moment time study process
3) Understand the 15 minute increment time study process

Location: 17th Floor - Grand Ballroom
Speakers: Amy Edwards (VA), Susan Fischer (MA), Mary Hall (VA)

How MA is Utilizing Technology to Respond to the Change of its School Based Claiming Program
After a complete change to the school-based Medicaid program over the past two years, MA is implementing a number of initiatives to improve the efficiency of the program, and assist providers to manage the change. The focus is use of improved technology and implementation of statewide Random Moment Time Study (RMTS) system for Administrative Activity Claiming (AAC) and Cost Reporting. Changes addressed include a move from a bundled rate system to a Certified Public Expenditure with annual cost reconciliation, utilizing an RMTS.

Objectives: Participants will be able to:
1) Identify ways to use technology to improve the efficiency of their program
2) Understand the importance of communication and training to providers
3) Understand strategies for implementing a more user-friendly RMTS process
Medicaid and the Schools after the Election: Will We Survive?
Which party ends up controlling the House and Senate and, more importantly, the White House, will define the future of Medicaid reimbursement for school based services. Block grants could completely eliminate federal reimbursement; elimination of sequestration could result in major changes to the Medicaid program; and there is legislation moving that would eliminate compensation for outreach for Medicaid and CHIP. This presentation will provide a look at the potential impacts of the 2012 General Election, which is just one month from the conclusion of this conference. This will be an interactive session, with audience participation encouraged.

Objectives: Participants will be able to:
1) Forecast the probable impact on their own programs based on the election results
2) Prepare short and long term program management options based on the election results
3) Share informed opinions with colleagues and superiors on relevant federal government activity in the new Congress

Location: 18th Floor - Salon 5/6
Speakers: John Hill (IN), Greg Morris (CA)

Friday, October 12, 2012

Regional Town Hall Reflections-Next Steps (8:30-9:30 am)
The Regional Town Hall discussions will have a recorder summarize the ideas, reflections and proposed action steps, shared by the attendees, and the summaries will be shared with the entire Conference during this session. Dialogue and clarification will be encouraged, and the NAME Board of Directors will compile the results which may be used to assist the Board with its long range planning.
SPEAKERS

David V. Abbott has been serving as the Deputy Commissioner at the Rhode Island Department of Elementary and Secondary Education (“RIHE”) since December of 2001. Under Commissioner Gist, Mr. Abbott is part of the Commissioner’s strategic leadership team and works with the Commissioner on the implementation of RIDE’s strategic plan for transforming education in Rhode Island. He is currently serving as Acting Commissioner while Commissioner Gist is on extended medical leave.

As the Deputy Commissioner, Mr. Abbott has broad oversight responsibilities for cross-cutting work across the Department and also plays a pivotal role in policy development and implementation. In addition, Mr. Abbott has served as General Counsel to the Department since January of 2007.

Prior to joining RIDE, Mr. Abbott was a partner in the law firm of Asquith, Mahoney & Robinson, where he represented several Rhode Island school districts in the areas of public policy, special education, civil rights, and labor law.

He holds an M.Ed. in Educational Policy, and is a former public-school teacher and Outward Bound course director. Mr. Abbott has published several articles in the areas of education law and policy and is a frequent speaker on public education issues.

Denise Achin has over 19 years of experience in working with local education agencies in Rhode Island, assisting them in accessing Medicaid funds. She was a main contributor to the following documents and resources: the Rhode Island Department of Human Services Medicaid Direct Services Guidebook for LEAs; Options and Resources (a brochure describing formal and informal due process for special education); a web-based resource guide for parents and providers working with children with special health care needs; IDEA Parent Consent to access Medicaid resources; and Fact Sheets for CEDARR Direct Services: PASS, Kids Connect and Respite. She holds a Bachelor of Arts Degree in History from the University of Massachusetts, Amherst and a Masters in Education Degree from Bridgewater State College.

Janice Axelrod is the Director of Federal Revenue Claiming for the Massachusetts Executive Office of Health and Human Services. The Federal Revenue Claiming Unit is responsible for submitting claims including Medicaid, TANF, SNAP, and Title IVE Foster Care/Adoption to the federal government. Janice has held the position for 8 years. Before assuming this position, Janice was Budget Director for the Early Education and Care Agency, and held various financial and policy positions related to health and human services throughout Massachusetts state government. Janice holds an MBA from Boston University with a focus on public management and finance.

Larry Bass holds BS and MS degrees in special education from Indiana State University and completed post graduate work that included licenses in elementary supervision and administration as well as director of special education. He taught students with mild, moderate and multiple disabilities for 19 years; worked 6 years as a special education coordinator, 4 years as building principal and was the school district’s director of special education for 11 years. Larry was instrumental in initiating the district’s Medicaid reimbursement program in 2001. As Director of State and Federal Programs, Larry currently oversees the district’s federal funds and the Medicaid reimbursement program, including the recent addition of MAC claiming in the fall of 2011.
Zachary Bastian was born and raised in Rhode Island. Living just a few miles from the beautiful beaches of the Narragansett Bay, Bastian is a product of his environment. From sailing with his family throughout New England before he could walk, Bastian has an immeasurable love and respect for New England. Bastian became a paraplegic his sophomore year of high school, now almost eight years ago. Bastian soon rediscovered surfing in San Diego. He has since returned to Rhode Island to pursue a career as a merchant mariner, and currently studies to earn his Captain’s license from the US Coast Guard. In addition, Bastian has returned to school to complete his undergraduate education, with a focus in adaptive recreation for the disabled. From spearheading the accessibility of Newport’s Harbor Shuttle, to empowering others from all across the country through Endless Abilities, Bastian has a strong future in creating equal opportunity for the disabled.

Janice Brannon, MA is the Director of State Special Initiatives in the Government Relations and Public Policy Division at the American Speech-Language Hearing Association (ASHA). She provides lead support on ASHA’s government relations response to telehealth activities and state licensure issues. Previously Ms. Brannon was a participant in the White House Working Group on Telemedicine, contributed to the discussion on the Nurse Licensure Compact while employed by the American Nurses Association and recently became co-chair of the ATA Inter-professional Work Group on Licensure Portability, Telerehabilitation SIG. Ms. Brannon’s 30 years’ experience in government relations has led her from halls of Capitol Hill to offices of a County Executive to President of her own consulting firm and director of state relations for a number of health care provider organizations. She has presented in numerous venues nationwide on advocacy and telehealth and has authored many articles in her field. Ms. Brannon received her BS from Towson University and her graduate degree from the University of Maryland, Baltimore County, both with honors.

Rick Brennan MS, MPA, MBA, is the Director of Program & Revenue Alternatives in the West Virginia Department of Health & Human Resources, Bureau of Administration. In that capacity, he coordinates various strategic initiatives across Agency Bureaus and programs in a broad range of areas. His focus is on combining innovative program and service delivery models in order to maximize the leverage of available funding alternatives with effective service provision and outcomes. Additionally, he focuses on the interrelationship of various programs and funding mechanisms. He is currently the Director of the WV CONNECT demonstration project, which provides coverage of primary care and preventive services for 10,000 uninsured West Virginians through the community health system (FQHCs). Other current and recent activities have included redesign of the WV School Based Health program (Medicaid), health care reform activities, data collection and reporting for ARRA, payment structure for WV Birth to Three (Part C), and Disproportionate Share and Upper Payment Limit initiatives.

Previously, Mr. Brennan served as the Director of the Office of Audit, Research and Analysis in the WV DHHR for 15 years. He is currently active in, and is a Past President of, the National Association of Human Services Finance Officers (HSFO) and the National Association for Welfare Research and Statistics (NAWRS). He still serves as the national Training Coordinator for HSFO, overseeing curriculum design, quality assurance, scheduling, and certification for professional training programs in Medicaid, Grants Administration, Cost Allocation, Child Welfare, and TANF. He is also completing the requirements for a Master’s Degree in Applied Theology.

Sharon Brown joined the CMS as a Presidential Management Intern in July 1997. Previously she earned a Master’s of Public Administration at Ohio State University and worked at the OSU Medical Center in the department of strategic planning. Her major responsibilities at CMS include review and approval of cost allocation plans, time studies, and implementation plans for capturing Medicaid-related direct medical service costs and administrative expenditures in various settings (i.e., schools, tribes, and hospitals).
Tracy Brunner, formerly the Indiana Medicaid agency’s EPSDT, School-based Medicaid claiming and Medicaid State Plan Coordinator, Tracy Brunner also served as a Research and Public Policy Analyst for the Indiana Education Project at Ball State University and a subject matter expert for the 2009 Mandated Report to Congress prepared by The Lewin Group. Now employed by the Indiana Department of Education, Tracy concentrates on school-based Medicaid policy analysis, program operations and technical assistance for Indiana’s state and local education agencies. She has represented the Indiana DOE on the State’s Mental Health Transformation Work Group, the Indiana Juvenile Justice and Mental Health Collaboration Project, and the Steering, Budget and 2012 Conference Committees of the Indiana School Health Network. Tracy is an officer and Board member of the National Alliance for Medicaid in Education (NAME, Inc.) and a frequent presenter at conferences and workshops for educators, school clinicians and other groups interested in Medicaid in Education. She holds a B.A. from Indiana University.

Bob Bundy is the President of Computer Automation Systems Medicaid Services, an organization that provides expert services in school-based Medicaid claiming. Mr. Bundy has over twenty-five years in high-tech services organizations and eleven years in educational services and brings a broad background of solutions design and innovation to his organization and the customers they serve.

Mary Cieslicki is a Technical Director for the Division of Reimbursement and State Financing in the Financial Management Group within CMCS. She has been with the Centers for Medicare and Medicaid Services (CMS) since 2002, specializing in reimbursement and funding of non institutional services. More recently, she has been involved in implementation of the ACA through her work as co-author of the regulation to increase payment to primary care providers. Prior to her tenure at CMS she was finance director of a Federally Qualified Health Center in Baltimore, Maryland. She earned a Master of Health Science degree from the Johns Hopkins Bloomberg School of Public Health.

Tripp Clemens united with Burrell as they shared a mutual passion for filmmaking in high school, and have since established Wind Powered Productions, a partnership committed to producing high quality films. Clemens shares his passion for working on the water with Bastian and Humphrey, as the three have worked to obtain their merchant mariner’s license from the US Coast Guard. From working on the set of a major motion picture, to studying Film Production and Business at Emerson College in Boston, Clemens sees the educational value in every experience.

Harold D. Daniels has been employed for seven years with the Area Medicaid Office responsible for the School Programs. Presently and for the past five years with the Hillsborough School District, responsible for all phases of the Medicaid Program in the district. At present the district is receiving ten (10) million dollars in reimbursement for the Medicaid program. This is an increase in excessive of 200% for the past 4-5 years.

Rochelle Davis is the President and CEO of the Healthy Schools Campaign, a national not-for-profit organization she founded in 2002 to advocate for healthy school environments. Davis also served as the Principal Investigator for Healthy Schools Campaign’s NIEHS-funded Partnership to Reduce Asthma and Obesity in Latino Schools, where she worked closely with community organizing for environmental justice around children’s health disparities. She was the founding director of Generation Green, a national membership organization that works on children’s environmental health issues, and has more than 20 years of experience in not-for-profit management and finance. Davis is a member of the EPA’s Committee for the Protection of Children’s Health and a founding member of the Green Cleaning Network. She served as a judge for Health magazine’s Healthiest Schools Contest and American School & University magazine’s Green Clean Award. She is co-author of Fresh Choices, a cookbook published by Rodale Press, and is the recipient of the Chicago Tribune’s 2007 Good Eating Award.
Jim Donoghue currently works for the Iowa Department of Education as a Consultant specializing in Medicaid. He provides technical assistance and acts as a liaison between Iowa Department of Education and the Iowa Department of Human Services Iowa Medicaid Enterprise for Iowa IDEA Part B and Part C service providers. Jim has served many organizations in the Health Care field. Mr. Donoghue holds a Master Degree in Psychology from University of Wisconsin, and holds licenses in California and Iowa for Marriage and Family Therapy. Mr. Donoghue is a current Education representative on the NAME Board of Directors for Region 2.

Ian Doughty is a Senior Manager based in the Chicago office. He has more than 12 years of experience in both the public and private sector in managing Medicaid operations and technology. He has held leadership positions in Illinois State government and in private sector consulting firms specializing in technology and change management. Mr. Doughty is a former Manager at Deloitte Consulting LLP and former Chief Operating Officer of the Illinois Department of Healthcare and Family Services. Mr. Doughty provides expertise in the areas of organizational transformation, including strategy development, process management, and technology implementation. He serves our public sector clients to help them achieve their goals through improving operational processes, and managing organizational change. Mr. Doughty earned a Masters of Public Policy (MPP) from the University of Chicago; Irving B. Harris School of Public Policy. He received a Bachelor of Arts in History from the University of Texas at Austin.

Amy Edwards has worked with Medicaid and Schools for 20 years. She was hired in 1992 by the Hanover Regional Grant to work with four Virginia counties to implement the Medicaid and school billing program. In 1999, she was hired by the Virginia Department of Education as the Medicaid Specialist. Her duties include working closely with our state Medicaid agency on such issues as memorandum of agreements, development of new school division Medicaid billable services, program requirements, and the State Plan Amendment. The State Plan Amendment involves reimbursement methodology issues, program requirements, and working with the Centers for Medicaid and Medicare. She also works with parental consent issues regarding Medicaid and Schools. She work directly with local school divisions to enhance their Medicaid billing program which includes regional trainings and state-wide annual Medicaid and schools program training.

Susan Fischer is a Director of School-Based Programs and Local Initiatives at the University of Massachusetts Medical School. Ms. Fischer has been instrumental in assisting states and local schools capture federal reimbursement for services provided in public-school settings and other state/local agencies. She has been an integral part of a team responsible for developing claim and time-study methodologies that comply with state and federal regulations in 9 states.

Deb Florio is the Administrator for Medical Services within the Medicaid Division of the Rhode Island Executive Office of Health and Human Services. Since 1999, her work has focused on development and administration of health care delivery systems for vulnerable populations enrolled in Medicaid. Ms. Florio is responsible for the Children’s Health Insurance Program (CHIP), the RITE Care program, (Rhode Island’s Medicaid Managed Care Program) which is nationally recognized for value based purchasing approach, Managed Care programs for children with special health care needs, RITE Share, (Rhode Island’s premium assistance program) and RITE Smiles, (the Rhode Island Medicaid managed care dental benefit program for young children) and Rhody Health Partners, a managed care program for adults with disabilities. Prior to working with the State, Ms Florio was the Director of Specialty Services and Managed Care within the Home and Community Service Division of an integrated Health Care Delivery System. Ms Florio completed her Master’s degree in Community Health Nursing at the University of Massachusetts.
**Jason Frandson** has been a member of the Centers for Medicare and Medicaid services (CMS) Division of Benefits and Coverage (DBC) since January 2011. As a member of DBC he reviews state plan amendments for school based services. Prior to his tenure at CMS he was a student clinician providing audiology & speech language services, served as a Social Security advocate and supervised a Medicaid eligibility and managed care team for a number of years. He earned a Bachelor’s degree in Psychology and Communication Disorders as well as a Masters of Business Administration.

**Mary Hall** received her BBA from St. Bonaventure University. She is the Medicaid Account Specialist for Hanover County Public Schools. She coordinates all aspects of their Medicaid/FAMIS program including developing procedures pertaining to Medicaid documentation and reimbursement and ensuring compliance with state and federal regulations. She interfaces with staff to maximize the Medicaid program and maintains and reviews all student Medicaid files. She coordinates all billable services (i.e. skilled nursing, speech, physical and occupational therapy services) and acts as liaison for Hanover County Public Schools with appropriate state agencies. She also collaborates with all necessary departments to obtain information on Medicaid-related activities as needed for Cost-Based Reimbursement and submits cost reports for reimbursement in addition to overseeing the administrative claiming program. She is the Region 1 LEA representative for NAME.

**Jennifer Haase** is the Financial Project Specialist for the Special Education and Early Childhood Services Department at the Muskegon (Michigan) Area Intermediate School District (MAISD), where she manages Medicaid reimbursement for fifteen local school districts. She trains local providers, assists office staff with program coordination and communicates current information to ensure compliance. Additionally, Jennifer works closely with Superintendents and Business Managers to project, reconcile and maximize Medicaid reimbursement. She is responsible for maintaining licensure, certification and approval documentation for all Special Education Personnel in Muskegon County, coordinating IDEA Grants and conducting Medicaid Quality Assurance File Reviews. Jennifer is in the process of finalizing the implementation of a new Special Education Case Management and Medicaid billing system for the MAISD. She attended last year’s Annual Conference in Albuquerque, NM and is an active participant in the Medicaid Implementer’s Group in Michigan.

**Bryan Hawkom** has been with Public Consulting Group (PCG) for 11 years. In that time, he was worked with school districts large and small as well as state agencies in MA, RI, NH, CT, MN, MI, NJ, TX, IN, Washington DC and more. Mr. Hawkom currently oversees PCG Education’s work in the Northeast and Midwest. He holds a Bachelors degree in Economics and Masters degree in Health Care Administration. Part of Mr. Hawkom’s work at PCG has focused on Medicaid billing and revenue maximization, as well as program design, rate setting, and the implementation of technology. He understands relevant state and federal regulations, as well as the challenges faced by states and school districts in implementing successful Medicaid billing programs. Prior to PCG, Mr. Hawkom worked to manage state and federal programs at a private, non-profit home care agency in Massachusetts.

**Kathleen Heiss** is the Assistive Technology Specialist and Medicaid Coordinator for the School City of Hammond. Kathleen assists the school clinicians on Medicaid administrative claiming, Medicaid direct billing for IEP services, monitoring district Medicaid records, and financial reporting involving Medicaid. Kathleen holds a BS in Elementary Education from Ball State University, an MS in Educational Administration/Director of Exceptional Needs from Purdue University, and an MS in Instructional Technology from Purdue University. Kathleen is a certified Assistive Technology Professional (ATP) through the Rehabilitation Engineering and Assistive Technology Society of North America (RESNA).
**John Hill** has over 35 years of experience working with and on behalf of individuals with disabilities, which included serving as the program manager for Indiana's Home & Community-Based Services waiver for persons with Developmental Disabilities for 5 years and serving as the Indiana State Director for the Bureau of Developmental Disabilities for two years. John served seven years, two of which as the chairperson, on the Indiana Commission on Rehabilitation Services and currently serves as the Department of Education’s (DOE) representative on the:

- Indiana Governor’s Commission for Persons with Disabilities;
- Indiana School for the Deaf school board;
- Indiana School for the Blind & Visually Impaired school board; and
- Division of Disability & Rehabilitative Service Advisory board.

For the past 11 years John has been with the Indiana DOE, Special Education. Currently his primary responsibilities include working with LEA’s on issues regarding racial/ethnic disproportionality and Medicaid reimbursement for both Medicaid Administrative Claiming and medically related IEP services. John is a member of the Indiana Covering Kids & Families board and is the co-chair for the School Committee. John was a founding member of LEAnet and served as secretary for four (LEAnet is a national organization of local public school corporations whose primary focus is protecting and enhancing funding for public school health programs and services). John is a founding member and a past President of the National Alliance for Medicaid in Education (NAME). He currently is the Chair of the NAME Governmental Affairs & Public Relations Committee.

**Will Humphrey** brings essential experience from the worlds of both disability and sport to *Endless Abilities*. While skiing competitively during his high school years, Humphrey studied adaptive mono-skiing in New Hampshire, a sport he committed to learning by forfeiting the use of his legs for a week. For the past six summers, he has volunteered as a mentor and instructor at Shake-a-Leg/Sail-to-Prevail, an adaptive sailing center in Newport, RI. Humphrey now studies recreational therapy with emphasis on physical disability at the University of New Hampshire. With consistent dedication to *Endless Abilities*, Humphrey is now partner of Wind Powered Productions.

**Bruce Hunter** came to the American Association of School Administrators (AASA) in 1982 as a Legislative Specialist, and became Director of Governmental Relations in 1986. During his tenure AASA has developed a large, active legislative corps that has facilitated school administrators’ influence on federal policy and legislation. Bruce has helped strengthen the AASA web site, online publications and the School Administrator Magazine while increasing ad revenue in a difficult economy. Bruce received a B.A. from the University of Northern Colorado, an M.A. from the University of Texas at El Paso and did graduate work in education administration at the University of Colorado. Prior to joining AASA, Bruce taught at both the secondary and collegiate levels. He also trained Head Start teachers, and was a grant administrator for the Education Commission of the States. Bruce was born and raised in Wyoming, and held positions in Wyoming, Colorado, New Mexico and Arizona before coming to AASA. Most importantly, Bruce is the father of four children, all of whom are intelligent, successful, charming, well-behaved and good looking. But they are the source of most of his grey hair.

**Marie Ireland, M.Ed. CCC-SLP** serves as the Virginia Department of Education’s educational specialist for Speech Language Pathology. She also provides professional development and technical assistance for evaluation and eligibility, language diversity, and general special education issues in Virginia. Mrs. Ireland received her bachelor’s degree from the University of Pittsburgh, her master’s degree from the University of Virginia, and is an ASHA certified Speech-Language Pathologist. She served on the Speech-Language Hearing Association of Virginia’s Board for 6 years, is President of the State Education Agencies Communication Disabilities Council, and is currently a member of the ASHA Medicaid Committee, and ASHA School School Finance Committee.
**Rick Jacobs** is a Principal based in Washington, DC. Mr. Jacobs has more than 25 years of experience in government, health care and consulting with governmental and non-profit organizations. Mr. Jacobs is a former Principal of Deloitte Consulting LLP and Managing Director of its School Based Health Services practice. Mr. Jacobs provides policy and risk management support to all Fairbanks projects and by maintaining a local presence in the nation’s capital enables Fairbanks to keep current on policy and program issues. This benefits our state and local agency clients by helping them to ensure that approved methodologies and principles are followed to maintain program integrity and manage risk. By bringing health care and Medicaid experience as a hospital administrator and government official to our clients, Mr. Jacobs enables Fairbanks to fuse national issues with state and local best practices. Mr. Jacobs earned both a Masters of Public Administration (MPA) degree and a Masters of Regional Planning (MRP) from the Syracuse University Maxwell Graduate School of Citizenship and Public Affairs, and graduated cum laude from Temple University with a Bachelor of Arts in American Studies.

**David Keller MD,** is Clinical Associate Professor of Pediatrics, Senior Policy Analyst of the Commonwealth Medicine’s Center for Healthcare Policy and Research at UMass Medical School and Associate Medical Director for the Office of Clinical Affairs at MassHealth, the Massachusetts Medicaid Agency. From 2009-10, he served as a Robert Wood Johnson Health Policy Fellow in the Office of the Assistant Secretary for Planning and Evaluation at the Department of Health and Human Services. Prior to that time, he was Medical Director of South County Pediatrics, a community-based teaching practice and “Medical Home” for children with special health care needs. He has extensive experience in addressing the social determinants of health, child advocacy and mental health integration at the practice and the population levels, and has published and presented work at national and international meetings, as well as peer-reviewed journals and several monographs. His current portfolio includes Project co-Director of the Rhode Island Chronic Care Sustainability Initiative (an all-payer medical home transformation project), faculty of the Massachusetts Patient-Centered Medical Home Initiative’s Learning Collaborative, team lead for the evaluation of the Massachusetts CHIPRA Quality Measure Medical Home Initiative, consultant to the Boston Public Health Commission’s Program, which integrates early childhood mental health with the medical home and expert consultant to ASPE as part of a study of practice innovation around the United States. He is also working with the American Academy of Pediatrics on the Community Pediatrics Training Initiative, an effort to develop new curricula linking pediatric practice to community service. He was recently selected to serve on HRSA’s Advisory Committee on Primary Care Medicine and Dentistry.

Dr. Keller received his A.B. from Princeton University and his M.D from Harvard Medical School. He did his pediatrics residency at Johns Hopkins Hospital in Baltimore and Children’s Hospital of Los Angeles, before serving with the National Health Service Corps at Crusaders Clinic in Rockford, Illinois. He completed a fellowship in ambulatory pediatrics and community health at the Children’s Hospital of Pittsburgh and took his current position on the UMass faculty in 1991. Dr Keller would bring expertise in the practice of medicine, health services delivery, public health, low-income and vulnerable populations, and children and youth.

**John Kelly, PhD,** has been a school psychologist with the Commack School District in New York since 1986. He has also taught in the school psychology graduate programs at St. John’s University and Adelphi University. Beyond John’s professional career in the schools and at the University training level, he has been active in local, state, and national professional associations. He is the chairperson for the School Psychology Committee of the Suffolk County Psychological Association, Past-President and current Legislative Chair of the New York Association of School Psychologists, member of the Executive Board of the New York State Psychological Association, and the Chair of the Government and Professional Relations Committee of the National Association of School Psychologists. John has had the opportunity to advocate for local, state, and national issues related to mental health, education, and school psychology. He has provided expert testimony on several occasions.
at the state level and participated on a panel briefing regarding children’s mental health
services in the schools before the U.S. Congress. John is the recipient of the 2001 School
Practitioner of the Year Award in New York and was honored by NASP as the 2003 School
Psychologist of the Year.

Elaine Lerner represents the New Jersey Department of Education in the Office of Special
Education. Ms. Lerner is responsible for overseeing the school based Medicaid billing
program on behalf of the Office of Special Education. As part of that role, Ms. Lerner
 collaborates with the Departments of Medicaid and Treasury in the implementation of New
Jersey’s Special Education Medicaid Initiative program. Ms. Lerner plays an integral role in
ongoing policy development by aiding in the collection of necessary information. She also
communicates information regarding Medicaid billing directly to NJ school districts and state
representatives, often conducting presentations to interested stakeholders. Ms. Lerner has
been a member of NAME since its inception. In addition to serving on NAME’s Board of
Directors, Ms. Lerner also sits on various committees and serves as the Chair of the Bylaws
Committee.

Richard R. McGreal is the Associate Regional Administrator for the Centers for Medicare
and Medicaid Services in the Boston Regional Office. In his current position he oversees the
Medicaid programs in the six New England states to determine compliance with the Federal
financial and program regulations. Richard has 25 years of experience working with the
Medicaid program at both the federal and state level. Prior to working at CMS Richard
worked for the Massachusetts Division of Medical Assistance, among the positions he was
director of external and legislative affairs.

Kathleen Cummins Merry became Executive Director of Medicaid Reimbursement for
Wayne RESA (the largest intermediate school district in Michigan servicing over 350,000
students) in 1992 when SBS first came to Michigan. Kathy currently serves as the LEA
board member for N.A.M.E.

Greg Morris, B.A, Stanford; J.D., University of Santa Clara, Co-Outstanding Graduate; law
clerk, California Supreme Court; Chairman, California Governor’s Efficiency Team, Health
Budget Overhaul; City Councilmember, Sunnyvale CA; billing and special education
consultant, nine different billing companies; cofounder/owner, Bellwether Group, school
billing company operating in MS, AL, and GA; consultant, State of Wyoming to draft school
billing program/legislation; consultant, New Mexico Association of School Executives to
redraft state billing program; expert witness, State of Ohio lawsuit supporting new MAC
program; expert witness on school billing and IEP software, Federal criminal trial in El Paso,
TX; Co-Founder and Executive Director, LEAnet; Coordinator, Medicaid in Schools;
registered lobbyist in seven states [not current]; currently consult with several companies in
the special education and Medicaid reimbursement industry and own/operate a blog and a
national alert system covering federal issues affecting Medicaid programs in schools.
Presenter at every past NAME beginning with Boston.

Alicia Neumann is the Director of MAC Programs at Paradigm Healthcare Services. Prior to
her work at Paradigm, she served for several years as the MAC/TCM Coordinator at the City
and County of San Francisco. Alicia holds an MPA in Health Policy and a Ph.D. in Sociology
from the University of California, San Francisco.

Elena Nicolella oversees the RI Medicaid Program. She joined the State in September
2009. Before that she worked as a consultant to the Rhode Island Departments of Human
Services and of Behavioral Health, Developmental Disabilities, and Hospitals. Elena worked
for the federal government for 15 years, first with the Food and Nutrition Services in the US
Department of Agriculture (1991-1997) and then the Centers for Medicare and Medicaid
Services (1997-2006). She received her Master’s in Public Health from Boston University
**Teresa Pastore** is a Senior Associate at the University of Massachusetts Medical School, Center for Health Care Financing. She has over 14 years of experience with School-Based Medicaid programs. She has assisted multiple states with the development and implementation of time studies, service claiming, administrative claiming and time studies. Ms. Pastore has served as a NAME Conference Committee chair for multiple conferences and has represented Massachusetts as the Region 1 Board Member. She holds a Bachelor of Science in Education from St. Bonaventure University.

**Donna Pletcher** has a B.S. in Financial Administration and worked for several years as a Financial Systems Analyst at a large financial institution. In 2003 she was hired by a software development company to assist with the implementation of an electronic data entry and billing software application at Wayne RESA. In 2006 she was hired by Wayne RESA's Medicaid Reimbursement office to assist with the development, implementation and day-to-day support of their in-house data entry and billing programs.

**Rumi Pavlova** is Cross-Agency Medicaid Program Director overseeing the Massachusetts School-Based Medicaid Program. In this position, Ms. Pavlova provides policy and federal claiming guidance for multiple social agencies that provide Medicaid services to MassHealth eligible population. She assists the Office of Medicaid with regulation compliance oversight and program integrity, as well as financial analysis, budgets, and strategic management. Prior to joining MassHealth, Ms. Pavlova worked for Public Consulting Group, where she managed the day-to-day operations of the MA Federal Revenue Maximization Project for the Executive Office of Health and Human Services. While with PCG, Ms. Pavlova managed the administration of Statewide Random Moment Time Study for the MA Executive Office for Elder Affairs. She has working knowledge of Medicaid, TANF, CCDF, SSI, and CDBG. Additionally, she worked on several international projects including welfare to work, economic and technology development in UK and European Union. Ms. Pavlova has experience in curriculum and program development, and is currently teaching mathematics to children 6-12 years old. She holds an MBA in Finance/Global Business, a BS in Management with Economic Development from Clark University, and studied Early Childhood Education in Sofia University.

**Luann L. Purcell** has been the Executive Director of the international Council of Administrators of Special Education, (CASE), since 2002. CASE is a division of the Council for Exceptional Children (CEC). Her responsibilities include: consulting and advising administrators on best practices for leadership and development of quality programs for students with disabilities; assisting members in developing networking systems through state, provincial, and country units in order to provide better services; advocating at the governmental level to assure appropriate legislation to facilitate quality programs; and providing keynote/breakout sessions/etc at state/provincial/regional conferences on leadership, legislative/policy updates, and other current education issues in over 38 states and 3 foreign countries.

During her 40 years in public education she has been a general education teacher at both high school and middle school level, teacher of students with emotional and behavioral disorders, coordinator at a regional educational service center, and assistant superintendent for pupil services for 18 years in a local district. She received her Bachelors’ Degree in History and English from Georgia Southern University and her Doctorate in Educational Administration from the University of Georgia.

**Jane E. Reagan, RDH, MPA** has been an employee of the State of Michigan since 1981, and since July 2002 has served as Department Specialist with the Department of Education in the Office of Special Education and Early Intervention Services (OSE-EIS) where she serves as a specialist in Medicaid reimbursement for services provided in Michigan schools. She previously spent 21 years with the Michigan Department of Community Health, where she worked in the Policy and Legal Affairs Administration for three years, and at the
Medicaid agency for 18 years. She began her career by spending eight years practicing as a clinical dental hygienist. She holds an Associate degree in dental hygiene from Ferris State University, a Bachelor's degree in Human Nutrition from Michigan State University, and a Master of Public Administration degree from Western Michigan University. She is a charter member of the NAME organization and has served on many committees and presented at many Annual Conferences. Currently she is NAME President, Chair of the Executive Committee.

**Nancy Reder** has served as NASDSE’s deputy executive director and director of government relations for 12 years. She has more than 35 years of experience in providing direct services to vulnerable children and families, policy analysis in human service programs and nonprofit management. She has worked on a broad array of federal legislative and regulatory issues affecting children and families, including families of children with disabilities and family economic issues. Nancy’s social work experiences include serving as a vocational rehabilitation counselor, a child welfare worker and a Title I school social worker. Nancy served as director of social policy for the League of Women Voters Education Fund and as a senior staff member of the U.S. House of Representatives Select Committee on Children, Youth and Families. She has spoken widely on federal policy affecting children with disabilities and their families. She received her B.A. and M.S.W. degrees from the University of Michigan and her J.D. from Catholic University of America.

**Richard J. Sagall, MD,** is a graduate of the Medical College of Ohio at Toledo and the family practice residency at Eastern Maine Medical Center, Bangor, ME. He practiced family and occupational medicine for 25 years. His the cofounder and president of NeedyMeds, a national non-profit that provides information on programs that help people who are unable to afford their medication and health care costs. He has spoken on this topic throughout the country to both professional and lay groups

**Jennifer Sheehy** is the Director of Policy and Planning in the OSERS in the US Department of Education. Prior to her current position, she served as acting Director of the National Institute on Disability and Rehabilitation Research (NIDRR), acting Deputy Commissioner of the Rehabilitation Services Administration and Special Assistant to the Assistant Secretary of OSERS. She came to OSERS from the Presidential Task Force on Employment of Adults with Disabilities where she was Senior Policy Advisor. She completed a detail as Associate Director in the White House Domestic Policy Council, implementing the President’s New Freedom Initiative and advising on policy issues of interest to people with disabilities. Before she joined the task force staff, she served as Vice President of the National Organization on Disability and Director of its CEO Council. She earned an MBA with honors from Georgetown University and a B.A. from Cornell University.

**Angela Sherwin** is currently the Principal Policy Associate for the Office of the Health Insurance Commissioner (OHIC) in Rhode Island. In this role, she leads Rhode Island’s Health Benefits Exchange planning and implementation efforts on behalf of OHIC.

Prior to this position, she was a senior policy analyst at the Massachusetts Health Connector, where she reviewed both federal and state health reform legislative proposals, analyzing the effect the proposals may have had on health insurance access and affordability for Massachusetts* residents. Angela has also worked as an independent consultant on a variety of health policy and research projects throughout New England related to primary care, health information exchanges, and health insurance affordability. Angela holds a Bachelor of Arts degree in Medical Ethics and Master of Public Health degree, both from Brown University.

**Michelle Simmons** holds a Masters and a Ph.D. from the University of Iowa. She has over 12 years of experience in public sector consulting, specializing in education services. She has supported multiple states with implementation and management of School Based
Services Programs. In addition she has worked in many states in the areas of special education information management, state longitudinal data systems, and data analytics. Prior to Dr. Simmons’ work in consulting she managed a nonprofit organization focused on disability advocacy efforts, as well as teaching at the university level.

**Rena Steyaert** holds a BS in teaching Health and Physical Education and has substitute taught for 7 years in Montana. I have worked for the State of Montana’s Medicaid Health Resource Division for 8 years and have been the Program Officer for School Based Services for the past 6 years. I set Medicaid reimbursement rates for School Based Services, administer the Medicaid Administrative Claiming or MAC program, develop Administrative Rules to run the program by and develop State Plan Amendments where I work closely with CMS. Rena also manages the Optometric program and Physical, Occupational and Speech Therapy programs for Montana Medicaid. Rena is on the Public Relations and Governmental Affairs Committee as well as the Education and Research Committee.

**Becky Stoddard** has worked for the Kentucky Department of Education since 1991, and has held various positions within the department. Since January 2007, she has been the Medicaid Liaison for the department coordinating with the Kentucky Department for Medicaid Services in the management of the Medicaid School-Based programs. She works directly with the Commonwealth’s 176 school districts, to oversee and monitor both the Direct Service and the Administrative Claiming initiatives. Ms. Stoddard currently serves as the chair of the Education and Research Committee as well as Education Representative to the NAME Board of Directors for Region 3.

**Kelly Vaillancourt** is the Director of Government Relations for the National Association of School Psychologists. She works collaboratively with public policy makers, education and health professionals, and elected officials to advocate for the importance and value of school psychology, school psychologists and school psychological services. She also represents NASP on a number of coalitions working to advocate for public policies that support NASP’s mission. Prior to joining the NASP staff, Kelly spent seven years practicing as a school psychologist in Loudoun County Public Schools (VA). During that time, Kelly served as a Central Based Crisis Team Leader, was a member of the Positive Behavior Interventions and Supports coordination team. Kelly has reviewed articles for CEC’s Exceptional Children, and the International Journal of Education Policy & Leadership and has delivered professional presentations and trainings on PBIS, data collection and analysis, school violence, crisis intervention, and mental health awareness. Kelly earned her BA in Psychology from the University of North Carolina at Chapel Hill and her MA and Certificate of Advanced Study in School Psychology from Appalachian State University. Kelly will earn her PhD in Education Policy at George Mason University this fall.

**Judi Wallace** has worked for the Centers for Medicare and Medicaid Services (CMS) since February 2005. She is member of the Administrative Claiming Team (ACT) in the Division of Reimbursement and State Financing (DRSF) for the Financial Management Group (FMG) at CMS. Her responsibilities include working with all States on the review of Administrative Claiming Plans, Cost Allocation Plans in the review and approval process for time studies for all claiming entities such as schools, public health and human service agencies and for tribes/tribal entities for the Medicaid program. She is currently involved in providing guidance on 90/10 HIT funding for ARRA and CMS Policy on Payment for Interpreter and Translation Services Legislation/Law: CHIPRA Section 201(b).

**Steven Wright** has worked for the New York State Education Department for the past 20 years, most recently in New York’s school based services program. In conjunction with the New York Medicaid agency, his team oversees policy and training for this program. He holds both undergraduate and graduate degrees in accounting from the State University of New York at Albany. Over the past seven years, Mr. Wright has been active in the NAME organization as a Board Director, as Treasurer and, most recently, as NAME’s President-Elect.
2011-12 Officers

President
Jane Reagan (MI)

President Elect
Steven Wright (NY)

Secretary
Tracy Brunner (IN)

Treasurer
Hal Matott (NY)

Immediate Past President
Denise Achin (RI)

2010-11 Board of Directors

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<th>Region II</th>
<th>Region III</th>
<th>At Large</th>
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<td>Sue Robertson (OK)</td>
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<td>LEA</td>
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Committees

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<td>Cathy Bennett, Co-Chair (CA)</td>
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<td>Jeremy Ford, Co-Chair (CA)</td>
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<td>Rose Uranga (CA)</td>
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<td>Denise Achin, Co-Chair (RI)</td>
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<td>Susan Alexander (NY)</td>
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<tr>
<td>Glenelle Bruneske (AZ)</td>
<td>Cathy Bennett (CA)</td>
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About NAME, Inc.

**Background:**
NAME was established in 2003 in response to the need to find a national forum for addressing the increasing complexity and challenges of Medicaid in school settings. It has evolved into a clearinghouse for information, in the service of helping members analyze their options in daily decision-making. NAME members from around the country are generous in sharing their expertise that comes from experience, networking and information disseminated by NAME.

**NAME’s Mission:**
NAME advocates program integrity for school-based Medicaid reimbursement

**Who Belongs to NAME?**
Generally NAME has 275 members from 44 states and Washington DC. Our members:
- Represent State Departments of Medicaid and Education and local educational agencies (LEAs) and dozens of businesses and professional organizations at the state and national levels
- Are professionals working on the state or local level who are involved in school-based Medicaid claiming for services provided for students in special education. Our members are involved in, but not limited to: Medicaid claiming and billing; Medicaid quality assurance oversight; Medicaid program development; policy making; policy implementation; and advocacy.

**Some Things NAME Does:**
- Provide professional development by sponsoring an Annual Conference, in September or October
- Hosts telephonic town meetings that focus on one specific topic at a time, allowing for dynamic interaction of participants and experts sharing news in their fields
- Share information with and facilitate networking among members and interested parties via the NAME Website:
  - Member-Only Section to increase the value for membership.

Members have access to NAME’s Committee work such as, the NAME National surveys, Education and Research topical conference call information, along with NAMES Regional updates along, federal and state technical advisories, audit reports, an expanding database of relevant documents for research, and
links to other websites and other organizations with shared interests

- Distributes a Bi-monthly NAME-tag newsletter with timely updates from a variety of sources to keep members in touch with their regions, the Conference Committee, the President, and others

- Build relationships and partner with national professional organizations, federal agencies and others and focus on issues important to NAME members

- Develops and conducts a Biennial Survey. This project gathers and interprets data and information from state Medicaid agencies, state education agencies and LEAs around the country, to better understand the School Based Medicaid Program nationwide. Components include program composition, services covered and fiscal and programmatic policy. Invaluable information has been provided to the press, government agencies, policy makers and members.

**NAME Provides:**
- A growing directory of members to contact with specific questions
- A research data base with information on various state policies for Medicaid funding in education
- A networking opportunity for like-minded policy makers and professionals to connect at all levels of involvement in the unique area of Medicaid in Education

### Past Presidents & Conference Locations

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<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Year</th>
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<tr>
<td>Dann Stevens (IA)</td>
<td>Denver, CO</td>
<td>2003</td>
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<tr>
<td>John Hill (IN)</td>
<td>Boston, MA</td>
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<tr>
<td>Cathy Griffin (MN)</td>
<td>Seattle, WA</td>
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<tr>
<td>Brenda Mack-Bowman (DE)</td>
<td>Indianapolis, IN</td>
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<tr>
<td>Elizabeth Touhey (CA)</td>
<td>Minneapolis, MN</td>
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<td>Michelle Lyons-Brown (AK)</td>
<td>San Diego, CA</td>
<td>2009</td>
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<td>Denise Achin (RI)</td>
<td>Williamsburg, VA</td>
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<tr>
<td>Jane Reagan (MI)</td>
<td>Albuquerque, NM</td>
<td>2011</td>
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<tr>
<td></td>
<td>Providence, RI</td>
<td>2012</td>
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New NAME Regions

Region 1
(Includes Puerto Rico and the Virgin Islands)

Region 2

Region 3

Region 3

NAME, Inc. would like to thank the following three companies for their generous support as GOLD Sponsors of the Nineth Annual NAME Conference: