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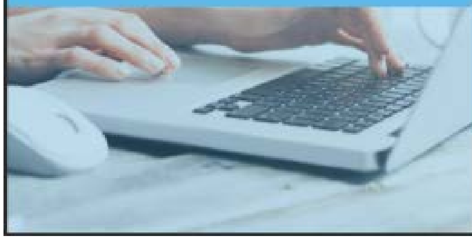


ACCOUNTING & REGULATORY TECHNICAL UPDATE
WEBINAR SERIES

- September 16
- September 30
- October 7
- Plus a Fall Panel Discussion to be Announced Soon

As Healthcare organizations continue to be at the forefront of the battle against COVID-19, Providers have continued to be faced with complex operational, clinical, and technical challenges and will continue to adapt as the world moves towards a post pandemic reality. This webinar series brings together a variety of healthcare professionals to provide the latest updates and perspectives from rating agencies, standard setters, and regulatory authorities relative to industry trends, financial reporting, tax and reimbursement.

In these webinars, participants will:

- Obtain a deeper understanding of how healthcare organizations are managing operations, their personnel and finances
- Get the latest updates from rating agencies, standard setters and regulatory authorities relative to emerging financial reporting, tax and reimbursement regulations.

Educational Committee Chair:
Karen Kinsella, Bank of America Merrill Lynch

Program Coordinator:
Erik Lynch, BDO

Registration:

Cost for Individual Webinars:
HFMA Members: $20
HFMA Student Members: $15
HFMA Retiree Members: $15
Non-Members: $30

Cost for All Three Webinars:
HFMA Members: $55
HFMA Student Members: $40
HFMA Retiree Members: $40
Non-Members: $80

Registration is Available Online at **www.MA-RI-HFMA.org/Event-Registration**.

Continuing Education Credits:

HFMA MA-RI National Sponsor Registry Number: 129053

HFMA Massachusetts-Rhode Island is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual course for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: **www.nasbaregistry.org.**

Group Internet Based Presentation		
Program	**Category**	**CPEs**
September 16	Specialized Knowledge - Technical	1.5
September 30	Specialized Knowledge - Technical	1.2
October 7	Taxes – Technical	1.8
Program Level: Intermediate		
Pre-requisite Requirements: No advanced preparation necessary		
In order to obtain CPE Credits, attendees must attend the live webinar session and answer all polling questions.		

Contacting the Office:
Any questions, concerns, or complaints can be addressed to **admin@ma-ri-hfma.org or 781-647-4422**

Session Information

FY 2022 Medicare Inpatient Final Rules

Thursday, September 16th, from 12:00 – 1:15 pm EST

This session will provide a summary of the FY 2022 Medicare Inpatient PPS Final Rules, other Medicare payment system updates and highlight evolving issues affecting hospital reimbursement and cost reporting.

Learning Objectives:

- FY 2022 Medicare Inpatient PPS Final Rules
  - Payment Updates
  - Uncompensated Care & Worksheet S-10
  - Wage Index
- Other FY 2022 and CY 2022 Medicare Payment System Highlights
- Reimbursement Hot Topics

Speaker:

Aaron Green, Principal, Green Reimbursement LLC

Aaron is a principal with Green Reimbursement LLC and has 26 years of hospital reimbursement experience. Aaron specializes in federal and state reimbursement matters, focusing on regulatory analysis, strategy solutions, cost reporting, and reimbursement projects such as wage index, uncompensated care, disproportionate share, and bad debts.

CPE and CEU Credits:
HFMA 1.25 / CPE 1.5

To obtain CPE Credits, attendees must attend the live webinar session and answer the polling questions.

Accounting and Financial Reporting Update

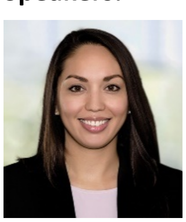
Thursday, September 30th from 12:00 – 1:00 pm EST

This webinar will provide an insight into the latest accounting and reporting requirements associated with the various funding components of the CARES Act and related relief measures provided in response to COVID-19. The webinar will also provide an update on Accounting Standards Updates with upcoming effective dates and how organizations can prepare for their adoption.

Learning Objectives:

- Understanding the latest accounting requirements for money received under the CARES Act or other sources
- Review various new accounting standard updates that become effective in the next few years

Speakers:



Courtney Zingale, Senior Manager, KPMG

Courtney is an Audit Senior Manager with ten years of experience serving healthcare providers, higher education and not-for-profit organizations. Courtney manages engagements performing financial statement audits, compliance audits, and audits covering internal controls over financial reporting.

Eszter Polecsak, Senior Manager, KPMG
Eszter is an Audit Senior Manager with over twelve years of experience at KPMG serving Clients primarily in the healthcare and life science industries. Eszter manages engagements performing audits in accordance with both AICPA and PCAOB standards.

CPE and CEU Credits:

HFMA 1.0 / CPE 1.2
To obtain CPE Credits, attendees must attend the live webinar session and answer the polling questions.

Tax Update

Thursday, October 7th from 12:00 – 1:30 pm EST

In the past year we have seen a number of important tax developments in the healthcare space, including the release of final regulations related to tax reform, and new mandatory e-filing requirements. This year has also been challenging for taxpayers in their interactions with the IRS. Tax is also playing a role in new challenges, and opportunities, related to environmental, social and corporate governance (ESG). This session will cover updates on the IRS, tax reform developments, and ESG.

Learning Objectives:

- Overview of IRS developments
- Highlight tax reform
- Quick highlights on Form 990 changes for 2020
- Discuss ESG as it relates to the healthcare sector

Speakers:

Gwen Spencer, Partner in the Exempt Organizations Tax Services Healthcare practice of PricewaterhouseCoopers' National Tax Services (NTS)
As a leader in this practice, Gwen provides advice regarding tax and business issues associated with tax-exempt organizations. She has over twenty years of experience consulting in the area of tax issues related to healthcare, higher education, and other tax-exempt organizations. She has expertise and experience in unrelated business taxable income, intermediate sanctions, obtaining and retaining exempt status (501(r)), compensation, fundraising, reporting requirements, controversy resolution, as well as general compliance matters.

Gwen has served as an Adjunct Professor for the Masters in Taxation Program at Northeastern University. She is the author of “Tax Issues for Today’s Tax-Exempt Healthcare Providers” published in HFMA MassMedia (Issue 3, 2015), "NPO Compensation in the Spotlight" published by the AICPA in the Journal of Accountancy in October of 2007, "Public Charities with Partnership Investments - Tax and Reporting Obligations" published by the ABA on the ABA Health eSource in February 2006, and “Partnership Investments by Public Charities: Tax Reporting Complexities” in The Tax Advisor, published by the AICPA in July 2005. She also presents regularly at industry conferences including National Association of College and University Business Officers and the Health Finance Management Association.

Gwen is a member of the Bar in Massachusetts and Connecticut, the Health Finance Management Association, the American Health Lawyers Association, the American Bar Association (past chair for the Tax and Accounting

Interest - Health Law Section), the Boston Bar Association, and the American Institute of Certified Public Accountants.

Gwen received a BS from Eastern Connecticut State University, a Juris Doctor from the University of Connecticut, and an LL.M. (Taxation) from Boston University. She is also a Certified Public Accountant.

Michael Hoffman, Director in the Exempt Organizations Tax Services Healthcare practice of PricewaterhouseCoopers' National Tax Services (NTS)
Michael is a Tax Director and has been a member of PwC's National Tax Services, Exempt Organizations Tax Services practice for nearly twelve years. Michael provides tax compliance and planning services for tax-exempt organizations, and has extensive experience with Form 990 compliance, unrelated business income tax reporting, and alternative investment analysis. Michael serves various tax-exempt organizations including healthcare organizations, educational institutions, private foundations, and trade associations. Michael has presented at the Greater Washington Society of CPAs Nonprofit Symposium, and was published in The Tax Adviser.

Michael is located in Washington DC, but his client base extends beyond the Washington, DC metropolitan region and includes clients in San Francisco, Los Angeles, Research Triangle Park, Boston, and Atlanta.
Michael is a Certified Public Accountant licensed in Virginia and the District of Columbia, and he is a member of the American Institute of Certified Public Accountants. He graduated with a B.S. in Accounting and a B.S. in Finance from the University of Maryland – College Park.

Peter Lee, **Senior Associate in the Exempt Organizations Tax Services Healthcare practice of PricewaterhouseCoopers' National Tax Services (NTS)**
Peter is a Senior Associate and has been a member of PwC's National Tax Services, Exempt Organizations Tax Services practice for nearly three years. Peter provides tax compliance and planning services for tax-exempt organizations, including healthcare organizations, and has significant experience with Form 990 compliance, Section 501(r) regulations, and unrelated business income tax reporting. Peter is located in the Boston office and has clients throughout the New England region and beyond.

Peter is a member of the Massachusetts Bar and received his J.D. from Boston College Law School in 2015. He received a B.A. from Villanova University.

Elizabeth Tucker, Managing Director in PwC's Washington National Tax Services' US Tax Controversy and Regulatory Services (TCRS) practice.
In this role, she advises and represents clients on a wide range of IRS practice and procedure matters including Audits, Appeals, and special programs including Pre-filing Agreements, Compliance Assurance Program (CAP), Private Letter Rulings and administrative guidance. Beth joined PwC in 2014, after a distinguished 29 year career with the Internal Revenue Service, retiring as Deputy Commissioner, one of the two highest ranking career positions at the IRS. Throughout her IRS career, Beth was responsible for a wide-range of tax administration, tax policy and IRS operational matters. As IRS Deputy Commissioner, Beth provided direction and oversight for major decisions affecting the IRS; oversaw more than 100,000 employees, an $11 billion dollar budget, the annual collection of over $2.4 trillion dollars of tax revenue, and the IRS information technology infrastructure of more than 650 computer systems. Beth also served as one of the primary IRS communicators to external stakeholders including Congress, tax professionals, industry groups and media on IRS programs, tax policies, tax law, and emerging compliance issues.

Other top level appointments held by Beth at the IRS included: Deputy Commissioner of the Wage and Investment Division, the IRS function responsible for compliance, customer service and account resolution for more than 120 million taxpayers and the annual filing and payment processing for 230 million taxpayers; Director of

Communications and Liaison where she was responsible for education and outreach to over 45 million business and self-employed taxpayers, including corporations and partnerships on all aspects of tax law, IRS policies and procedures and Director of Governmental Liaison, where she was responsible for enhancing Federal/State joint tax administration initiatives.

Beth started her IRS career as a Revenue Agent in the Dallas area and moved through the ranks in multiple examination divisions. Beth is the recipient of two Presidential Rank Awards (2012 Distinguished Rank Award and 2008 Meritorious Rank Award), the highest honor that can be bestowed on a career government executive. She also was recognized by the Federation of State Tax Administrators with the President's Award for Cooperative Tax Administration. Beth holds a Bachelor of Science degree in Accounting from the University of Texas, Arlington.

Alex Vaughn, Director in PwC's Trust Solutions Practice and ESG Lead
Alex Vaughn is a Director at PwC and is located in our Raleigh, NC office. As part of PwC's Trust Solutions practice, Alex has over 12 years of experience serving SEC registrants, nonpublic and not-for-profit healthcare entities. He serves as the lead for the PwC ESG efforts related to organizations in the healthcare sector. His responsibilities include preparing ESG related content and presenting to boards, executives and management teams as well as serving clients through ESG strategy assessments and other projects.

CPE and CEU Credits:
HFMA 1.5 / CPE 1.8
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