



**hfma**  
healthcare  
financial  
management  
association

# The BOTTOMLINE

October 2010

Oklahoma Chapter

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Greetings! Our last OHFMA meeting in July was a remarkable success, with excellent education sessions and wonderful networking opportunities. We also had record breaking attendance for this event! Thank you to everyone who participated in the planning of the event and to all of those in attendance.

Carley Williams, President-Elect, and I have just returned from the HFMA Fall President's Meeting in Cabo San Lucas, Mexico. At this meeting, we had the opportunity to meet with Region 9 leaders and share best practices of the various chapters within the group. It was an exciting time to learn from the other chapter's successes and I am looking forward to implementing ideas we received.

As I mentioned in our last newsletter, the current theme of HFMA's National Chair, Debi Kuchka-Craig, is "Step Up". We have a great opportunity for our members to do just that. In conjunction with the Oklahoma Hospital Association's Annual Meeting, we will be holding a chapter planning meeting for OHFMA. This is the time where our speakers are selected for upcoming meetings, our membership committee meets to look at membership needs, and other various committees meet as well. It is a very successful event that builds motivation and enthusiasm for our volunteers and is a great way to get involved in our chapter. This meeting will be held on November 10<sup>th</sup> from 1:00 p.m. – 5:00 p.m. at the Cox Convention Center in Oklahoma City. I encourage everyone to attend this workshop and learn about our chapter and our volunteer needs. We will also have an educational session the following morning.

Lastly, our Region 9 meeting in New Orleans is November 14 – 16. This is always a very informative meeting and this year is no exception! They have many great speakers lined out and as always, some excellent networking opportunities.

Thank you, again, for allowing me the opportunity to serve as your president of the Oklahoma Chapter. It has been an exciting year so far, and I am looking forward to the rest of the year. See you in November!!



*Erin Hill*  
*President OHFMA 2010-2011*

## Oklahoma Healthcare Financial Management Association

*OHA Mini Session Meeting November 11, 2010*

Cox Convention Center & Renaissance Hotel  
10 North Broadway, Oklahoma City, OK 73102

Thursday, November 11<sup>th</sup>

7:30 a.m.      **Registration Desk Opens**

8:15 – 9:45 a.m.      **Beyond Bailouts & Health Care Reform: Moving Forward with Capital Financing for Projects**  
William C. Wilson, Senior Vice President & Central States Regional Manager, Lancaster Pollard & Co.

While the bailout of Wall Street banks received a lot of press, 2009's stimulus act contained a number of provisions intended to spur capital investment. In addition, 2010's health care insurance reform means a changing landscape for hospitals across the country. With these major transformations in mind, the presentation will cover:

- Provisions of the stimulus bill that can help community banks participate in projects.
- Provisions of the stimulus bill expanding the reach of federal mortgage insurance and loan guarantee programs for hospitals.
- An assessment of what Health Care reform legislation will mean in terms of bond ratings, mergers and involvement by for-profit hospitals.

9:45 – 10:00 a.m.      **Break**

10:00 – 11:30 p.m.      **Community Medicine: An “All In” Approach to Improving Health Across a Large Community**  
Gerard P. Clancy, M.D., President, The University of Oklahoma, Tulsa

Dr. Clancy will share his vision for improving health within a large community with multiple agencies combining resources and working together without boundaries.

In 2001, Dr. Clancy was named Dean of the University of Oklahoma College of Medicine, Tulsa, Professor of Psychiatry, and the Morningside Health Care Foundation Endowed Chair in Leadership. In 2006, he also assumed the duties of President of OU-Tulsa. In 2008, with a \$50 million donation from the George Kaiser Family Foundation, Dr. Clancy led a successful effort to transform medical education at the University of Oklahoma – Tulsa. The OU College of Medicine in Tulsa was renamed the University of Oklahoma School of Community Medicine. The first of its kind in the nation, the school's mission is to utilize the university's many resources – clinical services, medical education programs, research, financial support and leadership – to improve the health status of all Oklahomans, particularly those in underserved rural and urban populations.

### **Continuing education credits are available for these programs**

If you have any questions or need additional information regarding the HFMA sessions of the convention, please contact Carley Williams at (918) 584-2900 or via e-mail at [cwilliams@bkd.com](mailto:cwilliams@bkd.com).

**Register for the program by completing the attached registration form and make sure to select the “Education Session sponsored by the Oklahoma Healthcare Financial Management Association” session on Thursday morning from 8:00 – 12:00. Or you can register online at [www.okoha.com](http://www.okoha.com). If you have any questions or need additional information regarding registration, please contact Shelly Bush at [bush@okoha.com](mailto:bush@okoha.com)**

## OHA Annual Convention Advance Registration Form

NOTE: The early discounted registration fee of \$175 applies to all registrations postmarked on or before Oct. 20, 2010. For registrations postmarked after Oct. 20, the general registration fee of \$200 will apply. See general and registration information on page 11 for information about member hospital group registrations.

**NOTE: When using one of the hospital group rates, all registration forms must be received by OHA at the same time and postmarked on or before Oct. 20.**

Please print or type all information. This information will be used to prepare your convention name badge. **USE ONE FORM FOR EACH REGISTRANT.** Copies may be made.

Name \_\_\_\_\_  
 First name for badge \_\_\_\_\_  
 Title \_\_\_\_\_ ACHE Status \_\_\_\_\_  
 Hospital/Organization \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_  
 Zip \_\_\_\_\_ Email \_\_\_\_\_  
 Business Phone (\_\_\_\_\_) \_\_\_\_\_  
 Spouse or Guest Attending \_\_\_\_\_

**Please Circle One:**

Exhibitor	President/CEO	Administration	COO
CFO	Guest	Trustee	Director
Manager	Volunteer	Dept. Head	Coordinator
Supervisor	Hospital Employee	Other	_____

**A. Required Registration for all Attendees**  
*(Please select one or more)*

**Individual Registration**  
 \$175 Early Bird Member Registration \$ \_\_\_\_\_  
*(Prior to Oct. 20, 2010)*  
 \$200 OHA Member Registration \$ \_\_\_\_\_  
*(After Oct. 20, 2010)*  
 \$30 Trustee Registration \$ \_\_\_\_\_  
 \$30 Spouse/Guest Registration \$ \_\_\_\_\_  
***(Does not apply to paid hospital employees)***  
 \$350 Non-member Registration \$ \_\_\_\_\_  
*(Employee of Non-Member Hospital)*

**Member Hospital Group Registration**  
 \_\_\_ of \_\_\_ forms included *(See details on page 11)*  
 OHA Member Hospital Registration - 10 registrants \$1,750 \$ \_\_\_\_\_  
 OHA Member Hospital Registration - 11-20 registrants \$1,750+\$50 per person over 10 \$ \_\_\_\_\_  
 OHA Member Hospital Registration - over 20 registrants \$2,250+\$25 per person over 20 \$ \_\_\_\_\_

**Volunteer Registration and Luncheon**  
*(Does not apply to paid hospital employees)*  
 \$50 Early Bird Member Volunteer (includes lunch) \$ \_\_\_\_\_  
*(Prior to Oct. 20, 2010)*  
 \$75 Member Volunteer (includes lunch) \$ \_\_\_\_\_  
*(After Oct. 20, 2010)*  
 \$125 Non-member Volunteer \$ \_\_\_\_\_

**Vendor Registration**  
 \$1,000 Non-exhibiting Vendor Registration \$ \_\_\_\_\_  
*(1 or 2 people)*

**Total of Section A** \$ \_\_\_\_\_  
**B. Optional Registration for Special Events**

**Wednesday, Nov. 10**  
 \$25 Volunteer Luncheon \$ \_\_\_\_\_

**Thursday, Nov. 11**  
 \$50 Chairman's Reception-Annual Banquet \$ \_\_\_\_\_

**Friday, Nov. 12**  
 \$30 ACHE Breakfast \$ \_\_\_\_\_  
 \$150 ACHE-Caldwell (3-hr. Category I for Credit) \$ \_\_\_\_\_  
 \$75 ACHE-Caldwell (without Credit) \$ \_\_\_\_\_

**Total of Section B** \$ \_\_\_\_\_

**Amount Enclosed** \$ \_\_\_\_\_  
*(add totals from Sections A & B)*

**Indicate Method of Payment**

\_\_\_ Check Enclosed (to OHERFT)  
**Make check payable to: OHERFT**  
**Return to:** OHERFT  
 Dept. #96-0298  
 Oklahoma City, OK 73196-0298

\_\_\_ Amex \_\_\_ DISCOVER \_\_\_ VISA \_\_\_ MasterCard

Account Number \_\_\_\_\_  
 Exp. Date \_\_\_\_\_  
 Name as it appears on card \_\_\_\_\_  
 Signature \_\_\_\_\_

Registrations paid by credit card should be mailed to:  
 Oklahoma Hospital Association  
 4000 Lincoln Boulevard  
 Oklahoma City, OK 73105  
 Credit card registrations may also be faxed to (405) 424-4507 or (405) 427-1566, or e-mailed to bush@okoha.com. You may also register online by visiting the OHA website at www.okoha.com.

**Refund Policy:** Requests for refunds must be received in writing before 4 p.m. on October 20, 2010; however, a \$75 service fee will be charged. **There will be no refunds after October 20, 2010.**

**Please complete and return BOTH sides of registration form.**  
*(over)*

## OHA Annual Convention Advance Registration Form - Session Checklist

Name \_\_\_\_\_

### Select Your Sessions

Customize your convention experience by indicating on the checklist below the sessions you plan to attend. This will also help OHA provide adequate meeting space for each event. **After you have selected the sessions you wish to attend, complete Sections A and B on the back of this form.**

#### Wednesday, Nov. 10, 2010

- 8:30-11:15 Rural Hospital Session
- 8:30-11:30 Education Session sponsored by Oklahoma Healthcare Human Resources Association
- 9:00-11:15 Hospital Volunteers of Oklahoma (Karfoth)
- 10:00-11:00 Oklahoma Health Information Management Association (Wiedemann)
- 10:00-4:30 Oklahoma Healthcare Financial Management Association Board Meeting
- 1:30-3:00 Opening Ceremonies and Keynote - "The Future of the Healthcare Marketplace: Life in the Gap and Life in the Game" (Morrison)
- 3:00-4:15 Executive Leadership Session (Mosley)
- 4:30-5:30 OHA Annual Business Meeting
- 5:30-7:30 OHA Welcoming Reception

#### Thursday, Nov. 11, 2010

- 8:00-9:30 General Session - "New Heights in Quality and Patient Safety: Lessons from a Blue Angel" (Foley)
- 8:00-12:00 Education Session sponsored by the Oklahoma Healthcare Financial Management Association
- 8:00-4:30 "Joint Commission Update & The Physical Environment" sponsored by the Oklahoma Association of Healthcare Engineers (Rivas)
- 8:00-11:45 Education Session sponsored by the Oklahoma Association of Medical Staff Services
- 8:30-11:30 "ROI Tracking" and "Health Care Marketing 2011" sponsored by the Public Relations & Marketing Society of the Oklahoma Hospital Association (Marlowe)

- 8:30-11:30 "The Rise and Fall of Entitlement" sponsored by Oklahoma Healthcare Human Resources Association (Manzer)
- 9:00-11:00 Education Session sponsored by the Oklahoma Society of Directors of Volunteer Services (Karfoth)
- 9:30-10:30 General Session - "Now Lead This! Wake Up and Smell the Innovation" (Newbold)
- 10:00-12:00 "Health Care Reform: What Does It Mean and Why Do I Care?" sponsored by the Oklahoma Organization of Nurse Executives (Davis)
- 10:30-12:00 "Ethical Dilemmas in Health Care - Ethics Made Real" sponsored by the Oklahoma Society for Healthcare Quality and Risk Management (Russell and Emmott)
- 10:30-3:30 Trade Show with complimentary lunch
- 1:30-3:30 "Ethical Dilemmas in Health Care - Ethics Made Real" sponsored by the Oklahoma Society for Healthcare Quality and Risk Management (cont.) (Russell and Emmott)
- 1:30-4:30 Education Session sponsored by Oklahoma Association of Medical Staff Services
- 2:30-4:00 "Management Strategies for NPSG #15: Identifying Patients at Risk for Suicide" sponsored by Oklahoma Psychiatric Hospital Association (Waugh)
- 3:30-4:30 General Session - "Walmart and the Future of Health Care" and "Rebooting Health Care" (Galloway)

**To register for the following events, go to Section B on the reverse side of this registration form.**

Wednesday, Nov. 10 Volunteer Luncheon  
Thursday, Nov. 11 Annual Awards Banquet  
Friday, Nov. 12 ACHE Breakfast  
ACHE Category I General Session

**Please complete and return BOTH sides of registration form.**  
*(over)*

## Region 9 Upcoming Dates

11/14/10 – 11/16/10 – HFMA Region 9 Conference (New Orleans) See brochure on page 9

1/27/11 – 1/28/11 – Winter Meeting (Tulsa at the Renaissance Hotel)

4/28/11 – 4/29/11 – Summer Meeting (OKC location TBD)



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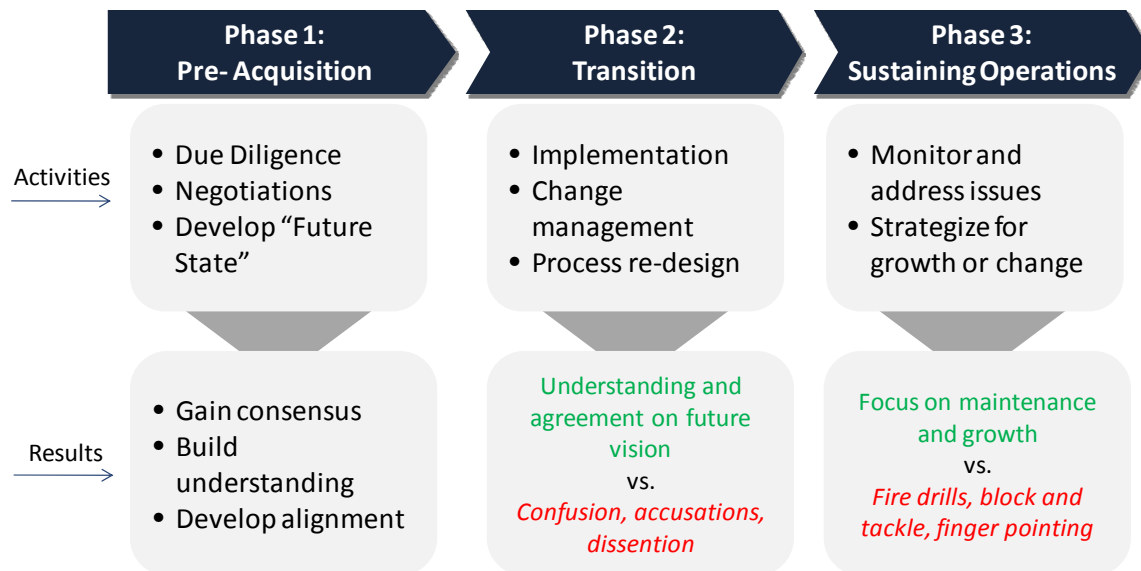


## Hospital – Physician Alignment – A Practical Approach and Framework

The health care industry is at a cross roads where independent physicians and hospital systems have been traveling down single lane highways heading toward a path that leads to one merged lane heading towards quality, reform, cost containment and technology. Physician alignment with Hospital systems, a concept of the past, is being revitalized as the market forces are playing a larger hand in merging these roads.

Each stakeholder, both physicians and hospitals, are facing the same environment with a slightly different impact and experience. Changing reimbursement models from payors are challenging facility margins and the ability for physicians to independently negotiate successfully. Electronic medical records (EMR) and health information technology (HIT) mandates are challenging hospital operational processes and physician practice’s capabilities to purchase and manage new systems. Medical technology cost and upgrades are challenging Hospitals’ investment returns, while independent physicians struggle to find the capital for investment. Scarce skilled human resources are challenging both stakeholders to recruit and retain. Quality and reporting requirements are creating execution challenges on both sides, as hospitals revisit operational policies and physicians are pulled away from care provision to manage new expectations. Finally, a struggling economy is creating a pool of uninsured and self-pay consumers, creating a challenge for collections and cash management.

As the environment pushes physicians and hospitals back into the alignment cycle, both parties have the opportunity to learn from past experiences, understand what failed and build partnership of the future. Like any integration, alignment or even marriage, open communication and planning are the keys to successful implementation. A well thought out integration strategy should follow a simple process:



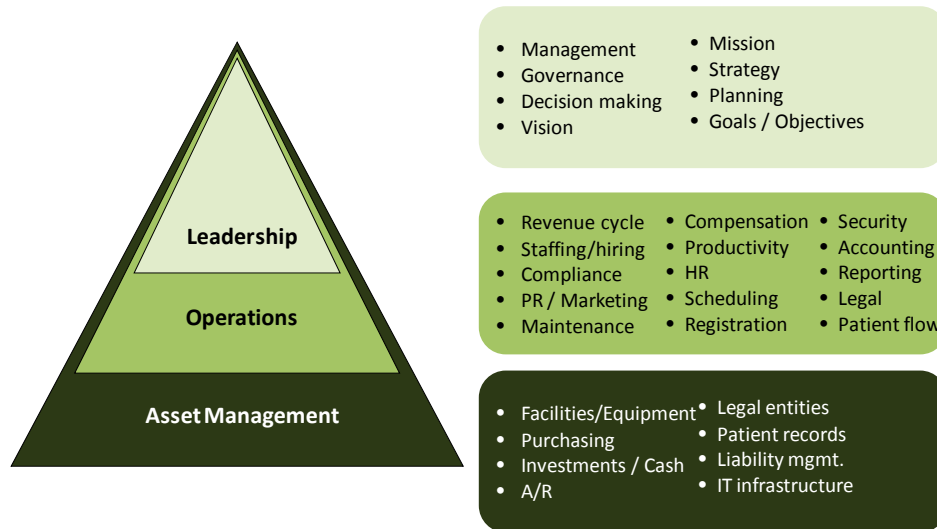
The ultimate success for the process outlined above is investing the time on Phase 1, even though stakeholders want to rush to Phase 3 – the end goal. A successful Phase 1 puts both the hospital and the physicians on the path for a successful Phase 2, where there is understanding and agreement, and a prosperous Phase 3, with a focus on growth and on-going maintenance. By not investing the time upfront, both parties risk a transition packed with organizational confusion, dissent and accusations followed by decades of fire drills to fix the issues and get around the finger pointing. Most of these relationships, like a marriage, will end in divorce or a lifetime of a turbulent, unpredictable chaos.

## Getting Started

You have found the opportunity for an alignment and both stakeholders are on board to begin discussions. The first step in the pre-acquisition phase is for both sides to take the time and invest in the resources to conduct the due diligence required prior to meeting for group discussions. Each party needs to obtain and build an understanding their independent goals and objectives and build an inventory of their assets, including staff, capital and resources coming into the new relationship. Identifying the right team for this process, delegating responsibility and empowering the decision makers are another key step to this process. Discussions between both sides should be open, friendly and provide the appropriate communication to be successful and efficient with moving forward.

Before negotiating, both parties should engage in full disclosure discussions sharing thoughts, ideas and/or even requirements they have for all of the attributes of the on-going relationship. Without a framework for guiding this discussion, there can be confusion and frustration on how even Phase 1 of the process is moving forward. A simple framework outlining the key elements for discussion can provide structure and transparency to the Phase in the process that requires the most work. Remember, a successful Phase 1, while the most time consuming phase, will create a swift Phase 2: Transition Period and eliminate road blocks in Phase 3: On-Going Sustainability.

The following framework provides a guideline for discussion. The framework highlights the critical elements for discussion and provides a solid foundation for building a relationship. All underlying future implementation issues should be able to reflect back to this solid framework for future guidance and decision making. Additionally, the future visibility and transparency of the framework will allow the key stakeholders the confidence to focus on growth and new endeavors.



It is important to note that all three areas need to be discussed and considered before moving into the implementation phase. Often, parties will focus primarily on the leadership attributes without consideration for operations and asset management. The idea that that leadership issues will be able to resolve all operational and asset management issues in the future is a common misconception when parties enter into an agreement with different principles of management, operational processes and execution methodologies. It is the daily operational work flows that can create the most disruption to the community, staff and patients; therefore resulting in the destruction of the alignment desired by both parties.

## Example Scenario: Physician compensation

Physician compensation can be the most sensitive topic during an alignment discussion, and yet the most integral to the future success. Compensation plans should be considered for new physicians, established physicians and special issue plans. As an example, physician compensation can take the form of a combination of straight salary with limited production, RVU driven or a base salary with an incentive. The pros and the cons should be considered for the range of items discussed. Each option should be weighed against the alignment it has to each stakeholder's objectives, in addition to the financial implication that it has to the organization.

There are several lessons in evaluating plans, including keeping the number of plan designs minimal to ease the administrative burden with on-going management. Engage physicians in the compensation planning committees and maintain a level of transparency with easy to use reporting tools to allow physicians to monitor against goals and production targets. Keep some level of performance measurement tied to a compensation component to drive growth and provide motivation. Finally, keep it simple! Complex plans can create confusion during the on-going sustainability phase which can lead to finger pointing and dissention.

## Next Steps

The process and framework illustrated above are just several of the tools that physician and hospital teams can use to facilitate the alignment and integration process during Phase 1. Decision matrixes, escalation trees, roles & responsibility definitions, process mapping and dashboards are examples of additional tools to facilitate the transition and on-going sustainability phases. A well structured communication plan including all stakeholders, e.g. community, staff, ancillary providers and patients, provides another tool to establish a clear communication strategy with actionable steps and timelines. Work plans with task identification, ownership, time lines and dependencies create a structured approach providing transparency and creating accountability. The most comprehensive strategies and ideas have fallen short if they lack the executable project management and guidelines for staff to follow.

Hospital and physicians that proactively take the time during the pre-application stage to engage in open communication with transparent information will create a healthier and productive work environment for all stakeholders involved, including staff, community and patients. The implementation and on-going sustainability phases rely on the success of the initial phase to set the groundwork for moving forward. It is the responsibility of the stakeholders who engage in the alignment process to address issues proactively to avoid the confusion and fire drill environment that can result. Hospitals and physicians are in the business of providing care. Sustainability depends on the efficiency and satisfaction that staff and patients feel during their work or patient flows. These positive experiences will be the direct factor that will lead to the sustainable bottom line.

*Allison is a senior manager in Eide Bailly's health care consulting practice out of the Minneapolis office. She is a Board member of the ACHE MN Chapter and the Minnesota Rural Health Association's president elect for the current year. Allison has more than 11 years of professional experience in financial and operational planning. Since receiving her MBA from Cornell University in New York, Allison has focused her consulting career in the health care industry, first with Deloitte Consulting and currently with Eide Bailly LLP. Her experiences include leading financial feasibility studies for rural hospitals, strategic planning efforts with large national provider and payer systems and operational and process redesign with provider systems. Allison can be reached at [alunde@eidebailly.com](mailto:alunde@eidebailly.com).*



**hfma** region 9  
healthcare financial management association  
arkansas | louisiana | mississippi | oklahoma | texas

# HFMA REGION 9

## 8<sup>th</sup> ANNUAL CONFERENCE

NOVEMBER 14-16, 2010  
**NEW ORLEANS**



21.5 CPE Credits

### General Sessions:

Healthcare Reform | Financial/Clinical Collaboration | Executive Panel | CIO Panel  
Physician Integration | Executive Perspective on EHR Challenges  
RAC: An Executive Overview | Fraud & Embezzlement: Lessons From the Trenches

### Revenue Cycle Topics:

RAC Audit Results & Best Practices | ACE Case Study | Non-Profit vs For-Profit Conversation

### Accounting/Finance Topics:

Medicare Cost Reports | Accounting & Audit Update | Reducing Clinical Costs  
Supply Chain Management

### Leadership Topics:

Leading in a Time of Change | Moving Up to CEO | Developing Your Staff to Achieve  
Leadership Persuasion Skills | Effective Written Business Communication

### HFMA Certification Training:

Core Coaching Course | Managed Care and Accounting/Finance Specialty Courses

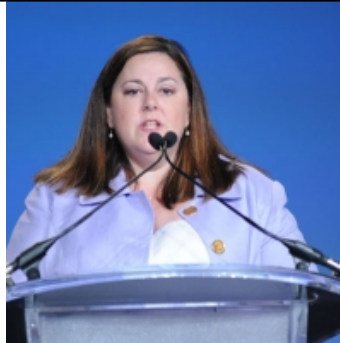
[www.hfmaregion9.org](http://www.hfmaregion9.org)

ANI 2010



Erick Schick receives MAP Award for High Performance in Revenue Cycle

Becky Speight, National Chair of the Board of Examiners



Erin Hill, current president, with Amy Marsh, past president

Amy Marsh receiving our chapter awards from National Chair, Catherine Jacobson, and National Chair-Elect, Debora Kuchka-Craig



# Welcome New Members

Anne Adams	Tax Manager	BKD, LLP
Patti Allgood	Manager	Saint Francis Health System
DeAnna Armitage	Registration Manager	Oklahoma Heart Hospital - South
Shelly Bailey	PBX Manager	Oklahoma Heart Hospital
Marianna Burnett	Chargemaster Coordinator	Oklahoma Heart Hospital
Tom Dean		Revenue Management Solutions
Andrea Fairbanks		
Patti Hall	Sr. Financial Analyst	Oklahoma State University Medical Center
Will Harrell		
Lorie Herring	Manager Accounting Services	Eastern Oklahoma Med Center
Tammy Long	Decision Support Analyst	Oklahoma Heart Hospital
Annette Munson	Manager, Professional Services	MedAssets
Steven Stubblefield	Director of Reimbursement	Mercy Health System of Oklahoma
Marilyn Waldenville	Senior Consultant	MedAssets
Brian Warden	Vice President	Bank of Oklahoma, N.A.

## IMPORTANT CERTIFICATION NEWS

Congratulations to the following Oklahoma Chapter members who have recently passed a certification exam:

*Yvonda Moore* – Mercy Health System – PFS Exam

*Bill Clark* – BKD – A&F Exam

As you are aware the pathway to becoming CHFP will change as of January 1, 2011. I would like to take this moment to briefly outline the major changes; study guides will be available online, testing will be held at designated testing sites, and there will only be one comprehensive certification test. It is

also important to mention that the requirements to becoming FHFMA will not change.

Given these certification changes, we are offering an open testing date to be located in Oklahoma City.

*Date:* Monday, November 29, 2010

*Time Starting:* 8:30 a.m.

*Location:* Deaconess Hospital  
5501 North Portland Avenue  
Oklahoma City, OK.

*Proctor:* Linda J. Short

This special session is available to those members who have previously passed one certification test and are in need of completing the additional test to satisfy the ***current*** requirements for CHFP. When enrolling online for this session, please make sure to note that Linda Short will be the proctor of record. Thank you, Linda!

all Specialty Exams will be allowed a maximum time of two hours. Please plan on commencing your testing promptly at the 8:30 a.m. start time.

If there are any questions concerning this testing session, or any questions concerning the new certification pathway, please feel free to contact me.

As a reminder, the Core Exam will be allowed a maximum time of four hours, and

Morris W. Brown, CHFP  
Certification Committee Chairperson  
Phone: 918-286-5565  
Email: [morris.brown@ctca-hope.com](mailto:morris.brown@ctca-hope.com)



# Many Thanks to Our Corporate Sponsors

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972-720-0381 Fax  
[dmccown@hcfsinc.com](mailto:dmccown@hcfsinc.com)

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888-499-4707  
817-348-0372 Fax  
[cstone@mrsftw.com](mailto:cstone@mrsftw.com)

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400 E. Central, Ste. 404  
Ponca City, OK 74601

David Mires  
580-762-5300  
[dmires@miresconsulting.com](mailto:dmires@miresconsulting.com)

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312-423-7556 Fax  
[ehorvat@harriscollect.com](mailto:ehorvat@harriscollect.com)

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Oklahoma City, OK 73112

Jim Peters  
405-425-1560  
405-425-1588 Fax  
[jpeters@cacfinancial.com](mailto:jpeters@cacfinancial.com)

The Midland Group  
5020 Bob Billings Pkwy  
Lawrence, KS 66049  
[www.midlandgroup.com](http://www.midlandgroup.com)

Laura Jones  
785-840-9676  
785-840-9677  
[laura@midlandgroup.com](mailto:laura@midlandgroup.com)

Works & Lentz, Inc.  
3030 NW Expressway, Ste. 225  
Oklahoma City, OK 73112-5434  
[www.worksandlentz.com](http://www.worksandlentz.com)

Shannon Fuller  
405-942-2211  
405-942-2370 Fax  
[sfuller@worksandlentz.com](mailto:sfuller@worksandlentz.com)

## Silver

Absolute Data Shredding  
1006 N. University  
Norman, OK 73069  
[www.shredok.com](http://www.shredok.com)

Mike Lacy  
405-321-7226  
[mike@shredok.com](mailto:mike@shredok.com)

Administrative Consultant Service, Inc.  
PO Box 3368  
678 Kickapoo Spur  
Shawnee, OK 74802  
[www.acsteam.net](http://www.acsteam.net)

Jeff N. Clark  
405-878-0118  
405-878-0411  
[jclark@acsteam.net](mailto:jclark@acsteam.net)

American Collection Services, Inc.  
3100 SW 59<sup>th</sup> Street  
Oklahoma City, OK 73119  
[www.americancollectionservices.com](http://www.americancollectionservices.com)

Louise Littlejohn  
405-682-8088 Ext. 121  
405-682-8044 Fax  
[louise@americancollectionservices.com](mailto:louise@americancollectionservices.com)

**Silver** (continued)

Apex Print Technologies, LLC  
100 South Owasso Blvd. W  
St. Paul, MN 55117  
[www.apexprint.com](http://www.apexprint.com)

Karlene Gilmore  
651-259-4637  
[kgilmore@apexprint.com](mailto:kgilmore@apexprint.com)

Berlin – Wheeler, Inc.  
711 W. McCarty  
Jefferson City, MO 65102

Connie Warnat  
573-680-9295  
417-724-2899 Fax  
[cwarnat@bwmo.com](mailto:cwarnat@bwmo.com)

CBSA Collections  
123 W. 7<sup>th</sup>, Ste. 300  
Stillwater, OK 74074-4068

Teresa Axton  
800-324-0781  
800-848-7559 Fax  
[teresa@collectpro.com](mailto:teresa@collectpro.com)

Central States Recovery  
PO Box 3130  
Hutchinson, KS 67504-3130  
[www.csrecovery.com](http://www.csrecovery.com)

Chuck Lyon  
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[www.mashinc.com](http://www.mashinc.com)

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### ADDRESS COMMUNICATIONS TO:

Sherry Schmitt Collins, Senior Manager  
Eide Bailly LLP  
T – 405.478.3334  
F - 405.478.5673  
[sschmittcollins@eidebailly.com](mailto:sschmittcollins@eidebailly.com)