

9<sup>th</sup> Annual TIER<sup>®</sup> User's Conference  
"Sequest Evolution"

*Yesterday, Today & Tomorrow...*

Conference:  
October 14-16, 2008

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## Session Overviews

### *General Sessions*

#### **Session #1 - Conference Welcome**

##### **Overview:**

Bill Connors will set the stage for our 9<sup>th</sup> TIER® User Conference. He will provide a short welcome and some ideas, thoughts and suggestions for a successful conference. Following Bill will be Pat Richie.

Pat is the founder of SLG Corporate. SLG Corporate has been teaching teambuilding, leadership and business ethics for over 25 years. Clients include; SEQUEST, Cingular Wireless, Indiana Pacers, Notre Dame, and many other fortune 500 companies and sports teams. Most notably the San Francisco 49'ers awarded him three Super Bowl rings recognizing his contributions to the team's success.

Pat will kick off of the conference with some thoughts on change, evolution, adapting, surviving, and succeeding.

**Guest Speaker:** Pat Richie

**Sequest Representative:** Bill Connors

**Recommended Attendees:** Everyone

## **Session #2 - Future of Human Services Delivery Systems in America**

### **Overview:**

There are many changes occurring in the human services and behavioral health systems in America. David and Terry will share some of the changes they are experiencing in their organizations. From Massachusetts to Mississippi the systems that once were are no longer-what does that mean for us? What are the trends, obstacles, opportunities and threats to service delivery systems? Please join us for what is intended to be a sharing of market changes within human services and behavioral health services.

**Guest Speaker:** David Jordan and Terry Hight

**Sequest Representative:** Bill Connors

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians

## **Session # 3 – Security**

### **Overview:**

In this session we will discuss Groups and Users Security, Setting Form Sections, Signature functionality in TIER<sup>®</sup> (Save Features). It will be an interactive session with a Sequest Presenter directing the class. This is for new and intermediate users of TIER<sup>®</sup>.

**Sequest Representative(s):** Scott Bell, Joe Monastra

**Recommended Attendees:** System Administration, Form Developers, Project Managers

## **Session # 4 - How to Use TIER<sup>®</sup> Billing Effectively**

### **Overview:**

To communicate the vision that the Sequest Technologies billing team has for managing billing aspects of the organization. In essence, an organization generates income by seeing patients / clients, billing for services and then collecting the money that is owed. While some patients pay for all services themselves, most patients have some form of health insurance or funding source. This means that your organization will need to create and submit an insurance claims bill in order to be paid for the majority of your services. This creates a need to develop a good accounts receivable management system to produce bills and keep track of your receivables.

**Sequest Representative(s):** Dan Rizzo, Rosa Palacios

**Recommended Attendees:** Business Office, Project Managers, C- Level Leadership

## **Session # 5 - Addictions Session**

### **Overview:**

This session is designed so our clients can network with other clients that are in similar delivery of care models. This is a chance to explore the changes that the industry is facing. What and how your colleagues manage the changes and the demands set forth by the industry and inter-agency challenges while still maintain quality care.

**Client Representative:** Jon Appel (CADAS – TN)

**Sequest Representative:** Brooks Cagle

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians, Project Managers, TIER<sup>®</sup> Team Members

## **Session # 6 - Behavioral Health Session**

### **Overview:**

This session is designed so our clients can network with other clients that are in similar delivery of care models. This is a chance to explore the changes that the industry is facing. What and how your colleagues manage the changes and the demands set forth by the industry and inter-agency challenges while still maintain quality care.

**Client Representative:** Bev Disen (Lifestream - FL)

**Sequest Representative:** Joe Kocsis

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians, Project Managers, TIER<sup>®</sup> Team Members

## **Session # 7 - Human Services Session**

### **Overview:**

This session is designed so our clients can network with other clients that are in similar delivery of care models. This is a chance to explore the changes that the industry is facing. What and how your colleagues manage the changes and the demands set forth by the industry and inter-agency challenges while still maintain quality care.

**Client Representative:** Michelle Gwaltney (Family Services of Central Indiana – IN)

**Sequest Representative:** Mark Steward

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians, Project Managers, TIER<sup>®</sup> Team Members

## **Session # 8 - Doc Watch**

### **Overview:**

In this session we will discuss the use of Docwatch, the delivery method for Docwatch- Tmail and provide an overview of the setup for Tmail and DocWatch.

**Sequest Representative(s):** Scott Bell, Anu Rao, Jim Mays

**Recommended Attendees:** System Administration, Form Developers, Project Managers

## **Session # 9 - Maximizing Performance from SQL Server**

### **Overview:**

In this session we will discuss the SQL database models that can be installed (single server, cluster, etc) as well as the various configuration settings that can be modified in order to maximize the performance of Microsoft SQL server.

**Sequest Representative(s):** Scott Bell, Joe Monastra

**Recommended Attendees:** System Administration

## **Session # 10 - Sequest Tomorrow - Bill Connors**

### **Overview:**

**"Change starts when someone sees the next step."**

Our 25<sup>th</sup> year in business was the most exciting and energizing for Sequest. Sequest President/CEO Bill Connors discusses the evolution of Sequest and our commitment to adapt to market changes ensuring us long term partnerships. Company initiatives will be discussed and together we will set the stage for tomorrow.

**Sequest Representative:** Bill Connors

**Recommended Attendees:** Everyone

## **Session # 11 - TIER<sup>®</sup> Tomorrow**

### **Overview:**

This session will focus on new features that add to the evolution of TIER. Join us to view new TIER features that are in the next release. Also, see some of the development efforts Sequest is involved in to achieve the goal of being a complete integrated solution.

**Sequest Representative(s):** Dan Rizzo

**Recommended Attendees:** Everyone

## **Session # 12 - Implementing Your System - Case Study - 5 Phase approach**

### **Overview:**

This session is a client case study on the Project Management approach to implement TIER<sup>®</sup> and what tasks are involved in the 5 phases.

Initial Phase

Design Phase

Construction Phase

Implementation Phase

Execute Phase

Geo Care is currently implementing the WFS and multiple interfaces.

**Client Representative:** Kathy Greenberg (Geo Care – FL)

**Sequest Representative:** Shelly Casale

**Recommended Attendees:** Project Managers, Leadership, TIER<sup>®</sup> Team Members, System Administrators

## **Session # 13 - Data Migration - Case Study**

### **Overview:**

To communicate tools and techniques used by Sequest Technologies development team to successfully migrate client data from existing data sources to TIER. We will demonstrate sample data migration plan with details of decisions that need to be made, what dangers to avoid, and the critical steps to a successful data migration. We will share our data migration implementation plan that we use as a template to everyone in attendance.

**Sequest Representative(s):** Joe Monastra, Gayathri Raghavan, Dan Rizzo

**Recommended Attendees:** Project Managers, System Administrators, TIER<sup>®</sup> Team Members

## **Session # 14 - Stress Management**

### **Overview:**

In this session we will discuss the importance of stress management. The training will focus on the causes of stress, the physiological, behavioral, emotional and cognitive impact of stress, the importance of relaxation and introduce stress management techniques.

**Sequest Representative:** Joe Kocsis

**Recommended Attendees:** Anyone who needs a little stress relief

## **Session # 15 - Improving Communication with Tech Support**

### **Overview:**

This session will offer tips and solutions to users on how to improve communication with Sequest Tech support. Items discussed will include how to open a ticket with support and how to make sure we get all the details as well as how to submit service requests, report bugs detected and request future enhancements.

**Sequest Representative(s):** Kelly Currie, Linda Vokoun, Debbie Allison, Jim McFadden, Adriel Archie

**Recommended Attendees:** TIER® Developers, System Administrators, Project Managers

## **Session # 16 - Design Tools**

### **Overview:**

In this session we will discuss in detail some of the SQL stored procedures we have developed to make processes easier for the end user. It will be an interactive session with a Sequest Presenter directing. This is for more advanced users of TIER<sup>®</sup>.

**Sequest Representative(s):** Robin Milam, Kari Alvarez, Anu Rao

**Recommended Attendees:** TIER<sup>®</sup> Developers, System Administrators, Project Managers, TIER<sup>®</sup> Team Members

## **Session # 17 - TIER<sup>®</sup> Add-ons - Bar Code, Sig Pad, Scanned Docs, Tablet PC, Jaws, Dragon Speak**

### **Overview:**

In this session we will discuss the use of the Bar Code scanner, Signature Pad, and Tablet PC as well as discuss the Scanned Document feature in TIER<sup>®</sup>. We will also review the benefits of speech recognition software, JAWS and Dragon NaturallySpeaking, and how it's used within TIER<sup>®</sup>. This will be an interactive session with a Sequest Presenter directing the use of the add-ons. This is for all user levels of TIER<sup>®</sup>.

**Client Representative(s):** Melissa Ogletree (ABVI - NY) / Bob Fernandez (Marworth - PA)

**Sequest Representative(s):** Kari Alvarez, Jim Mays, Cristina Prince

**Recommended Attendees:** Project Managers, Leadership, TIER<sup>®</sup> Team Members, TIER<sup>®</sup> Developers, System Administrators

## **Session # 18 - HL7 - Case Study**

### **Overview:**

This session is a client case study on HL7 interfaces within TIER<sup>®</sup>. It will explore concerns, challenges, obstacles faced prior to HL7 implementation, also, the data-efficiency, any reduced costs (?), or long-term benefits post-HL7 implementation.

**Client Representative:** Doug Salvino (Ashley - MD)

**Sequest Representative:** Deon Lumpkin

**Recommended Attendees:** Project Managers, Leadership, TIER<sup>®</sup> Team Members

## **Session # 19 - What's New In WFS**

### **Overview:**

In this session we will discuss some of the new features that have been added to WFS this past year. It will be an interactive session with a Sequest Presenter directing. This is for all levels of users of TIER<sup>®</sup>.

**Sequest Representative(s):** Robin Milam, Scott Bell, Jim Mays

**Recommended Attendees:** TIER<sup>®</sup> Developers, TIER<sup>®</sup> Team Members, Project Managers, Clinicians

## **Session # 20 - Sequest Chat**

### **Overview:**

This session has always been an open session for Clients and Sequest staff to get together and ask questions, process ideas and share knowledge on all aspects of TIER<sup>®</sup> and TIER<sup>®</sup> projects.

**Sequest Representative(s):** Various Sequest Staff

**Recommended Attendees:** All Groups

## **Session # 21 - Addictions and TIER<sup>®</sup> – Tomorrow**

### **Overview:**

This session is a follow up to the "Addictions Session". The focus of the Addictions Session is to share industry and organizational challenges that software, services or technology could better support your meeting/overcoming those challenges.

Our product and services must adapt to your needs so they are able to meet the challenges of tomorrow. This is meant to be a dialogue on market needs and possible product and services development.

**Sequest Representative(s):** Brooks Cagle, Jim Mays

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians, Project Managers, TIER<sup>®</sup> Team Members

## **Session # 22 - Behavioral Health and TIER<sup>®</sup> – Tomorrow**

### **Overview:**

This session is a follow up to the "Behavioral Health Session". The focus of the Behavioral Health Session was to share with colleagues the challenges the industry is facing and also inter-agency challenges. The focus on this session is how and/or what is needed in TIER<sup>®</sup> to support clients so they are able to meet the challenges of tomorrow.

Our product and services must adapt to your needs so they are able to meet the challenges of tomorrow. This is meant to be a dialogue on market needs and possible product and services development.

**Sequest Representative(s):** Joe Kocsis, Dan Rizzo

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians, Project Managers, TIER<sup>®</sup> Team Members

## **Session # 23 - Human Services and TIER<sup>®</sup> – Tomorrow**

### **Overview:**

This session is a follow up to the "Human Services Session". The focus of the Human Services Session was to share with colleagues the challenges the industry is facing and also inter-agency challenges. The focus on this session is how and/or what is needed in TIER<sup>®</sup> to support clients so they are able to meet the challenges of tomorrow.

Our product and services must adapt to your needs so they are able to meet the challenges of tomorrow. This is meant to be a dialogue on market needs and possible product and services development.

**Sequest Representative(s):** Mark Steward, Shelly Casale

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians, Project Managers, TIER<sup>®</sup> Team Members

## **Session # 24 - TIER<sup>®</sup> Troubleshooting**

### **Overview:**

This session will offer tips and solutions to common Sequest Support Tickets. Frequently Asked Questions will be covered as well as a Checklist of Support Items to try before contacting support.

**Sequest Representative:** Kelly Currie, Linda Vokoun, Debbie Allison, Jim McFadden, Adriel Archie

**Recommended Attendees:** TIER<sup>®</sup> Developers, System Administrators, Project Managers

## **Session # 25 - Implementation - Getting Started**

### **Overview:**

This session is a discussion of the 5 Phases of Implementation and tips for resolution of the unique challenges encountered in each phase.

**Sequest Representative:** Jim Mays, Scott Bell

**Recommended Attendees:** Project Managers, Leadership, TIER<sup>®</sup> Team Members, System Administrators

## **Session # 26 - Advanced User Forum**

### **Overview:**

This session is an open session for discussion among advanced users/Developers to share ideas, make connections and form local user groups

**Sequest Representative:** Dan Rizzo, Anu Rao, Deon Lumpkin

**Recommended Attendees:** Advanced Users/Developers

## **Session # 27 - Design Phase - How to keep momentum**

### **Overview:**

This session concentrates on the design phase of the project and how to keep project momentum. The Design phase is categorized as the phase in which you are gathering requirements, performing the gap analysis and agreeing on design requirements. This phase is generally the longest span of time in the project and is the phase in which organizations have a hard time making progress.

**Sequest Representative:** Shelly Casale, Jo Weir

**Recommended Attendees:** Project Managers, Leadership, TIER® Team Members

## ***Leadership Sessions***

### **Session # L-1 – Five Dysfunctions of Team**

**Overview:** Pat will discuss the concepts covered in the book "Five Dysfunctions of a Team". This is a follow up to last years' session.

**Sequest Representative:** Pat Richie

**Recommended Attendees:** C- Level Leadership

### **Session # L-2 – Standardization/Certification/Legislation**

**Overview:** Change may come to us by way of federal or state legislation. The federal government has set the wheels in motion for the Decade of Information Technology. Electronic medical records are going to be standardized-what will that mean and why is this happening? California is leading the way for many state level initiatives to support EMR adoption. The federal government's creation of Commission for Certification of Health Information Technology (CCHIT) will impact what we-Sequest & you- do in the not so distant future.

**Client Representative:** Rachael Clausen (EMQ – CA)

**Sequest Representative:** Bill Connors

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians

## **Session # L-3 - Changes in Psychiatric and Addiction Treatment Services**

### **Overview:**

We have two experts from the field to deliver their insight to the changes within their markets. Ron Hunsicker is Chief Executive Officer of the National Association of Addiction Treatment Providers (NAATP) and Dr. Richard Rosenthal is the Chair of Psychiatry at St. Luke's Roosevelt in New York City. Our guests are extreme supporters of the use of technology within their care centers and are heavily committed to electronic medical records.

**Guest Speaker(s):** Dr. Richard Rosenthal, Ron Hunsicker

**Sequest Representative:** Bill Connors

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians

## **Session # L-4 - Dashboards, Graphics for Executive Suite**

### **Overview:**

Last year's discussion related to use of TIER<sup>®</sup> for graphical representation of data was very well received. This year Sequest is excited to introduce Joe Monastra-former Chief Operating Officer of Hanley Center- as a Sequest employee and today's presenter. Joe will join with Bill to deliver ideas, thoughts and discussion to make executive reporting more efficient for you.

**Sequest Representative:** Joe Monastra, Bill Connors

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians

## **Session # L-5 - Added Value Opportunities-HRIS and Other Possibilities**

### **Overview:**

Client partners often inquire what we-Sequest-can recommend other software needs-Human Resources, Payroll, Time Keeping. Bill Connors and Les Goldstein, Acentis CEO have begun exploring ways to deliver one integrated solution across the TIER® Workflow System and Acentis HR. This is the first of several other alliances being explored by Sequest.

One fully developed alliance is between LabCorp and Sequest Technologies. Sequest signed a value added partnership with Laboratory Corporation of America in June 2008.

What other business needs may be a connection point for us to pursue?

**Guest Speaker:** Les Goldstein

**Sequest Representative:** Joe Monastra

**Recommended Attendees:** C- Level Leadership, Business Office, Clinicians

## ***Supplemental Sessions***

### **Session # S-1 - Roll up Your Sleeves**

#### **Overview:**

These sessions are designed for our clients to "Roll up your Sleeves" with the Sequest Staff. Bring in questions, Form Design, project plans etc. and we will work with you to resolve, plan or guide you to resolution. If you have a particular form or report issues you want to work on – bring a copy

**Sequest Representative(s):** Various Sequest Staff

### **Session # S-2 - Break Room**

#### **Overview:**

A place to relax and enjoy conversation with peers

### **Session # S-3 - Product Demonstration**

#### **Overview:**

Here is the chance to review / see the Work Flow Systems or particular modules within the Work Flow System

Come Explore.

**Sequest Representative:** Geoff Fisher