

2026 Workshop for Transplant Financial Coordinators

October 21-23, 2026 | Hyatt Regency Salt Lake City

Wednesday, October 21, 2026

7:00am–5:00pm Salt Lake Foyer	Registration Open
7:00am–5:00pm Salt Lake Foyer	Exhibit Area Open
7:00am–8:00am Salt Lake A	Breakfast
GENERAL SESSIONS	
	<i>Please sit with your transplant region; signs are on the tables.</i>
8:00am–8:30am Salt Lake C	Welcome to Salt Lake City! Lisa McDermott, TFCA President
8:30am–9:30am Salt Lake C	Keynote Address Speaker: Brady Dransfield, South Jordan, UT

	Moderator: Lisa McDermott, Transplant Operations Analyst, TFCA President, Methodist Healthcare, Memphis, TN <i>More Than a Transplant: A Story of Life, Love, and Purpose</i> shares how a life-saving kidney transplant became the beginning of a life filled with new purpose, including meeting my wife, building careers centered around kidney care, and discovering a purpose through organ donation and transplantation. I reflect on the realities of life after transplant while highlighting the hope, resilience, and purpose that can grow from a second chance at life.
9:30am–10:00am Salt Lake Foyer	Break with Exhibitors
10:00am–11:00am Salt Lake C	ABTC TFC Certification Advancing Your Credentials: Understanding the ABTC Process for TFCs Speaker: Kim Phillips, Senior Director, MSN, RN, CCTC, ABTC, Salt Lake City, UT <i>This session provides an overview of the ABTC Certified Transplant Financial Coordinator (CTFC) credential and its value to transplant financial coordinator professionals. Participants will gain a clear understanding of the certification process, the distinction between ABTC certification categories, and the requirements for maintaining the CTFC credential. The session will also provide practical, real-world strategies for preparing for the certification examination, developing a personalized study plan, utilizing key preparation resources, and securing employer support for certification. Whether pursuing CTFC certification for the first time or planning for long-term credential maintenance, attendees will leave with practical tools and resources to support their professional development and continued success.</i> <i>By the end of this session, participants will be able to:</i> • Identify three benefits of obtaining the ABTC Certified Transplant Financial Coordinator (CTFC) credential. • Differentiate between ABTC's NCCA-accredited certifications and professional certifications and identify the category in which the CTFC credential belongs. • List the ABTC Category I CEPTC credit requirements for maintaining the ABTC CTFC credential after initial certification. • Describe the process for registering for the ABTC CTFC certification examination. • Identify five key strategies for successfully preparing for the CTFC certification examination. • Develop a personalized self-study plan based on an individual learning style. • Identify two strategies for gaining employer support for CTFC certification.

11:00am–12:00pm Salt Lake C	Round Tables: Building Blocks of Best Practices—Different Programs: Same Patient Concerns & Dynamics ◆ BMT ◆ Heart ◆ Kidney ◆ Liver ◆ Lung/Thoracic ◆ Multi-Visceral ◆ Pediatric ◆ KPD Communicating and collaborating Learning together Round table session
12:00pm–1:00pm Salt Lake A	Lunch
CONCURRENT BREAKOUT SESSIONS I	
1:00pm–2:00pm Salt Lake B	<u>Living Donors</u> Practical Tools for Managing Living Donor Financial Challenges Andrea Tietjen, AVP, Transplant Administration, Quality & Finance, MBA, CPA, Cooperman Barnabas Medical Center, Livingston, NH Emily Walz, Training & Education Coordinator, MSW, LCSW, CCTSW, NLDAC, Arlington, VA <i>1) Present issues and barriers identified with financial costs incurred by the living donor</i> <i>2) Impart strategies to assist programs to effectively mitigate costs incurred for living donation</i> <i>3) Describe and demonstrate processes, procedures, tools, and resources to assist programs and donors with the costs of living donation</i>

	<i>Many people may want to help a family member or friend who needs an organ transplant but are hesitant to step forward due to the high cost of non-medical expenses not covered by insurance. The National Living Donor Assistance Center is able to provide financial assistance to eligible donors to help with the cost associated with transportation, dependent care expenses, or lost wages. Without this assistance, the financial burden placed on these individuals may make donation impossible.</i> Objectives: • <i>Educate on the types of assistance available through NLDAC</i> • <i>Provide information on who is eligible for assistance</i> • <i>Discuss how financial counselors can help to obtain this funding for their living donors</i>
1:00pm–2:00pm Salt Lake E	<u>Epic</u> Navigating Epic Charge Review WQs Deidra Simano, CTFC, Transplant Financial Manager, Boston Medical Center, Boston, MA Sina Thimas, MBA, Business Regulatory Affairs Manager—Heart Transplant, Beth Israel Deaconess Medical Center, Boston, MA <i>This beginner-level session will introduce Transplant Financial Coordinators, Managers, and Directors to the design, logic, and workflow of Epic work queues. Participants will explore how work queues are structured, routed, and managed within Epic, with a focus on how they support daily operations for Transplant Financial Coordinators and provide visibility into workload management, performance monitoring, and operational oversight for Managers and Directors.</i> <i>Upon completion of this session, participants will be able to:</i> • <i>Describe the fundamental components of Epic work queue design and workflow.</i> • <i>Explain how work queues are utilized by Transplant Financial Coordinators to manage and prioritize daily financial clearance activities.</i> • <i>Recognize how Managers and Directors can use work queues to monitor productivity, identify bottlenecks, and support operational decision-making.</i> • <i>Identify opportunities for workflow optimization and apply basic strategies to improve efficiency, accountability, and overall transplant financial operations.</i>

CONCURRENT BREAKOUT SESSIONS II

2:00pm–3:00pm Salt Lake D	<u>TFC Basics</u> Financial Assessment & Documentation in Transplant: A Panel Discussion for TFC Best Practices TFCA Board Members: Kara Hovatter, LSSGB–CTFC, TFCA Treasurer, Virtua Health, Camden, NJ Lindsay Bennett, Project Facilitator–CTFC, TFCA Trustee, University of Utah, Salt Lake City, UT Shari Steele, Sr. Transplant Financial Coordinator–CTFC, TFCA Trustee, Swedish Medical Center, Seattle, WA <i>Join experienced transplant financial counselors and leaders for an interactive panel discussion exploring the fundamentals of financial assessment and documentation within the transplant process. Panelists will share best practices, real-world experiences, and key strategies for ensuring accurate financial clearance, comprehensive documentation, and effective patient communication. Attendees will gain practical insights into strengthening core competencies while building the confidence and skills needed to advance as leaders within transplant financial services.</i>
2:00pm–3:00pm Salt Lake E	<u>Pediatric</u> Supporting Families, Securing Futures: Financial Coordination in Pediatric Transplant Care Rose Marshall, MBA, Manager—Patient Revenue Management, Duke University Health System, Durham, NC <i>Behind every successful transplant is a team working to ensure patients and families can access the care they need. This session explores the critical role of transplant financial coordination in navigating insurance requirements, securing authorizations, addressing financial barriers, and supporting patients throughout the transplant journey. Attendees will gain practical insights into strategies that improve access to care, strengthen collaboration across multidisciplinary teams, and enhance the patient and family experience from evaluation through post-transplant care.</i>
2:00pm–3:00pm Salt Lake B	<u>Contracting</u> Maximizing Transplant Revenue: The Vital Role of the Transplant Financial Coordinator Lisa McDermott, Transplant Billing Manager, TFCA President, Methodist Healthcare, Memphis, TN <i>Managing the financial complexities of organ transplantation requires specialized expertise at every stage of the patient’s journey. This session explores the critical role of Transplant Financial Coordinator (TFCs) from referral to post-transplant care. Attendees will discover how core TFC responsibilities directly</i>

	<i>influence financial outcomes, with insights on maximizing reimbursement and protecting transplant center revenue.</i>
3:00pm–3:30pm Salt Lake Foyer	Break with Exhibitors
CONCURRENT BREAKOUT SESSIONS III	
3:30pm–4:30pm Salt Lake D	<u>BMT</u> Improving Patient Access to Cell & Gene Therapy: Financial Coordination in CAR-T and Beyond Raj Dhami, Program Coordinator III, Sutter Medical Center Sacramento, Sacramento, CA
3:30pm–4:30pm Salt Lake B	<u>Payer Education</u> Navigating Payer Relationships: Key Insights for Transplant Contracting Success Andrea Tietjen, AVP, Transplant Administrative Services, MBA, CPA, Cooperman Barnabas Medical Center, Livingston, NJ <i>This session will provide key insights and the latest updates on payer education initiatives within the organ transplant contracting space. Attendees will learn collaborative strategies and best practices to improve alignment between payers and transplant centers.</i> <i>Learning Objectives:</i> <i>By the end of this session, participants will be able to:</i> <i>1. Identify recent developments and challenges in organ transplant payer contracting.</i> <i>2. Learn of effective approaches for educating payers and fostering collaborative relationships.</i> <i>3. Apply insights to enhance contracting strategies and patient access to transplant services.</i>
3:30pm–4:30pm Salt Lake E	<u>Heart VAD</u> Cracking the Code: Case-Based Approaches to Authorization Success in Heart Transplant & VAD Erin Davis, Nurse Manager, CT Transplant, MCS & AHF Programs, MBS, BSN, RN, University of Utah Health, Salt Lake City, UT

	<i>Not every transplant authorization follows the playbook. Cracking the Hardest Codes challenges adult and pediatric Transplant Financial Coordinators to solve complex heart transplant, VAD, and multi-organ authorization scenarios using real-world case studies. Participants will learn to:</i> • <i>Evaluate complex authorization scenarios and navigate pathways for approval</i> • <i>Develop effective strategies to address insurance barriers, payer policy interpretation, and authorization denials</i> • <i>Apply best practices and lessons learned to real-world cases to improve patient access to life-saving therapies</i>
5:30pm–6:30pm Salt Lake Foyer	TFCA Welcome Reception

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October 21–23, 2026 | Hyatt Regency Salt Lake City

Thursday, October 22, 2026

7:15am–4:45pm Salt Lake Foyer	Registration Open
7:15am–2:30pm Salt Lake Foyer	Exhibit Area Open
7:15am–9:00am Salt Lake A	Breakfast Note: TFCA Business Meeting starts at 8:00am for all TFCA members.
7:45am Salt Lake Foyer	Check-In for the TFCA Business Meeting Please check in prior to the business meeting. The business meeting will begin promptly at 8:00am.
8:00am–9:30am Salt Lake C	TFCA Business Meeting Transplant Financial Coordinators Association. Session attendance limited to TFCA members. The TFCA Business Meeting is for active TFCA members only. The TFCA governing body will disseminate association business information, including Officer Reports, Financial Reports, and Committee Reports: Certification, Fundraising, Elections, Planning, and Resource Guide. Open discussion will

	follow officer reports and committee updates for members to ask questions and seek clarification on subjects and topics pertinent to the organization. There will be drawings for door prizes. You must be present to win!
9:30am–9:45am Salt Lake Foyer	Break with Exhibitors
GENERAL SESSION	
9:45am–10:45am Salt Lake C	Funding the Path Forward: Tactical Approaches to Transplant Kristy Brown, Chief Development Officer, COTA Melissa McQueen, MBA, Executive Director of Transplant Families Programs, COTA <i>This session brings together national nonprofit organizations for a tactical look at funding the transplant journey: Children's Organ Transplant Association (COTA) – and its Transplant Families program - and Help Hope Live. Speakers will share how their organizations help patients and families navigate the financial realities of transplant, from community-based fundraising to education, advocacy, and family support. Attendees will leave with practical strategies for connecting patients and families to nonprofit resources and building partnerships that strengthen the financial path to transplant.</i>
CONCURRENT BREAKOUT SESSION IV	
10:45am–11:45am Salt Lake E	<u>Pharmacy</u> Understand the Essential Parts of Medicare A, B, C, and D Kristin Fox-Smith, MPA, 340B ACE, Managing Director, Visante, Salt Lake City, UT <i>1. Why are there different parts of Medicare, and do I need them all?</i> <i>2. Help to understand how to best optimize Medicare coverage in a landscape of continual change, especially related to medication coverage.</i>

10:45am–11:45am Salt Lake B	<u>Cost Report Basics</u> Basic Overview of Medicare Reimbursement for Transplant and Organ Acquisition Costs Robert Howey, CPA, MBA, MHA, Senior Consultant, Transplant Management Group <i>This foundational session provides an overview of Medicare reimbursement for transplant and organ acquisition costs. Attendees will develop a practical understanding of the key Medicare cost report worksheets and the primary factors that drive reimbursement. The session will also highlight common and less common findings identified through Medicare cost report audits and reviews across transplant centers, along with practical insights to help organizations strengthen reporting accuracy and compliance.</i>
10:45am–11:45am Salt Lake D	<u>Kidney</u> Charitable Assistance for Post Kidney Transplant Patients Dwana Bailey, Sr. Transplant Financial Coordinator–A.H.A, CTFC, TFCA Trustee, TMF Planning Advisor, Ochsner Health, New Orleans, LA <i>Join this interactive discussion focused on the unique financial challenges and opportunities facing post-kidney transplant patients as they navigate charitable assistance programs. Through discussion and audience engagement, attendees will share experiences, practical strategies, and solutions to help patients successfully access and sustain charitable support throughout their post-transplant journey.</i>
12:00pm–1:00pm Salt Lake A	Lunch
CONCURRENT BREAKOUT SESSIONS V	
1:00pm–2:00pm Salt Lake D	<u>Kidney Donor Pairing</u>

	Kidney Paired Donation: Financial Coordination from Donor to Recipient Megan Davis, Transplant Business Operations Manager, UW Medicine, Seattle, WA <i>Kidney Paired Donation programs present unique financial coordination challenges that require close collaboration across transplant centers, billing departments, and paired exchange organizations. This session will provide a practical overview of financial coordination throughout the KPD process, including financial agreements, invoicing and reimbursement, reconciliation, and Medicare cost reporting considerations, with examples from both the National Kidney Registry (NKR) and Alliance for Paired Kidney Donation (APKD). Attendees will leave with practical workflows, lessons learned, and best practices that can be adapted to support their own KPD programs.</i>
1:00pm–2:00pm Salt Lake D	<u>Cost Report Advanced</u> Advanced Medicare Cost Report Robert Howey, CPA, MBA, MHA, Senior Consultant, Transplant Management Group <i>Building on the concepts introduced in the foundational session, this advanced presentation takes a deeper dive into the Medicare cost report components that have the greatest impact on organ acquisition reimbursement. Attendees will examine advanced reporting considerations, best practices, and targeted strategies to strengthen documentation, improve operational processes, and enhance reporting accuracy. The session will also explore opportunities to maximize Medicare reimbursement while maintaining compliance with CMS regulations.</i>
1:00pm–2:00pm Salt Lake E	<u>Payer Education</u> Strengthening Financial Navigation: Tools and Strategies for Transplant Coordinators Tina Gieffers, CTFC, AA, Senior Financial Counselor, In Kind Partnership with WA SHIBA, Providence Advanced Heart Disease & Transplant, Spokane, WA <i>Join me in discussing the many ways you can assist your patient with financial readiness for</i>

	<i>transplant. We will explore federal, state, and other resources that may be available for your transplant candidate.</i>
2:00pm–2:30pm Salt Lake Foyer	Break with Exhibitors Prize drawing—must be present to win.
CONCURRENT BREAKOUT SESSIONS VI	
2:30pm–3:30pm Salt Lake B	<u>Medicare ESRD—Advanced Session</u> The Crucial Role Medicare Places with ESRD/Kidney Transplant Ana Meredith, Transplant Financial Coordinator—Kidney Transplant, Dignity Health/CommonSpirit, St. Joseph’s Hospital & Medical Center <i>In this session, we will dive into why Medicare is such an important benefit for kidney transplant recipients and their living donors. We will talk about how Medicare works with other insurance types like commercial plans, marketplace coverage, Medicaid, and Tricare. We will also touch on educating referring facility staff.</i>
2:30pm–3:30pm Salt Lake E	<u>Medicare 101—Beginner Session</u> Understanding Medicare in Transplantation: Empowering New TFCs with Tools and Resources Lindsay Bennett, CTFC, Transplant Financial Coordinator, Project Facilitator, TFCA Trustee, University of Utah Health, Salt Lake City, UT <i>This session provides new Transplant Financial Coordinators (TFCs) with an overview of Medicare coverage for solid organ transplantation. Participants will learn Medicare eligibility, the role of Parts A, B, and D, coverage requirements, and how Medicare covers transplant services, immunosuppressive medications, and follow-up care. Key resources and tools will also be introduced to support effective patient financial coordination.</i>

2:30pm–3:30pm Salt Lake D	<u>BMT</u> Connecting Patients to Care: Blood Cancer United Resources and Support Services Dawn Guerrero, MBA, Sr. Manager, Patient & Community Outreach, Blood Cancer United, Washington, D.C. • <i>Increase awareness of the programs, services, and support resources available through Blood Cancer United for transplant recipients, blood cancer patients, and their caregivers.</i> • <i>Develop strategies for effectively navigating resource availability, ordering educational materials, and utilizing the Blood Cancer United website during and after the transition from LLS branding.</i> • <i>Explore opportunities to collaborate with your local Patient & Community Outreach Manager to enhance patient access to support, education, and community resources.</i>
GENERAL SESSION	
3:30pm–4:30pm Salt Lake C	The TFC Balance Act: An Interactive Approach to Work-Life and Real-World Challenges Nicole Vachon, BAHCA, TFC, TFCA Trustee, UC San Diego Health, La Jolla, CA <i>Being a Transplant Financial Coordinator requires balancing complex patient needs, competing priorities, and high-pressure situations. Through audience participation, real-world case discussions, and guided reflection, this interactive session will explore practical strategies for navigating workplace challenges, setting healthy boundaries, managing stress, and building resilience. Attendees will leave with actionable tools and fresh perspectives to support both their professional success and personal well-being.</i>

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Friday, October 23, 2026

7:30am–12:30pm
Salt Lake Foyer

Registration Open

7:00am–8:30am
Salt Lake A

Breakfast

MICRO LEARNING SESSIONS

8:30am–9:30am
Salt Lake A

HCT/BMT/CAR-T

Topic lead Network & Learn session; choose one to attend.

8:30am–9:30am
Salt Lake B

EPIC

Topic lead Network & Learn session; choose one to attend.

8:30am–9:30am
Salt Lake D

Living Donors

Topic lead Network & Learn session; choose one to attend.

8:30am–9:30am Salt Lake E	<u>TFC Connect</u> Topic lead Network & Learn session; choose one to attend.
8:30am–9:30am Salt Lake C	<u>CTFC Readiness Lab</u> Developing the CTFC Thinking Framework TFCA members only.
9:30am–10:00am Salt Lake Foyer	Break Use this time for check-out; bring luggage to sessions. General Sessions special prize drawing during the 12:00pm General Session— not to be missed. Must be in attendance to win.
MICRO LEARNING SESSIONS — REPEAT SESSION	
10:00am–11:00am Salt Lake A	<u>HCT/BMT/CAR-T</u> Topic lead Network & Learn session; choose one to attend.
10:00am–11:00am Salt Lake B	<u>EPIC</u> Topic lead Network & Learn session; choose one to attend.
10:00am–11:00am Salt Lake D	<u>Living Donors</u> Topic lead Network & Learn session; choose one to attend.
10:00am–11:00am Salt Lake E	<u>TFC Connect</u> Topic lead Network & Learn session; choose one to attend.
10:00am–11:00am Salt Lake C	<u>CTFC Readiness Lab</u> Developing the CTFC Thinking Framework TFCA members only.

GENERAL SESSION

11:00am–12:00pm

Salt Lake C

Navigating Change: Candid Conversations—Real Talk on Transplant Finance

Jennifer Milton, MBA, BSN, Chief Administrative Officer, University Health Transplant Institute; Clinical Assistant Professor; Joan Wish Endowed Professorship in Transplant Surgery; Malú & Carlos Alvarez Center for Transplantation, Hepatobiliary Surgery & Innovation, UT Health San Antonio, Boerne, TX

Elsie Rojas Duarte, Executive Director Transplant, University Health Transplant Institute, San Antonio, TX

Leadership transitions happen at every level and is critical for Transplant Financial. Through the lens of their own ongoing handoff, Jennifer Milton and Elsie Rojas Duarte share a candid look at transitioning transplant financial leadership: how to transfer institutional knowledge, anticipate challenges, and review metrics with fresh eyes. Attendees will learn practical strategies for closing knowledge gaps and uncovering what they do not know -whether giving or receiving the handoff.

12:00pm–12:30pm

Salt Lake C

Wrap-Up

2026 TFCA Workshop Wrap-Up & Evaluations

Lisa McDermott, TFCA President, Transplant Billing Manager, Methodist Healthcare, Memphis, TN

Lisa Donovan, CTFC, TFCA Vice President, Sr. Transplant Financial Coordinator, SUNY Upstate University Hospital, Syracuse, NY