

TRAUMASOFT

EVOLVE

## Program Guide

Traumasoft User Conference

Gaylord Palms Resort & Conference Center

November 7, 8, 9, 2022

WE  
COME



## EMS is changing - EMS is evolving.

For EMS businesses to keep up, they need to stay at the forefront of technology and best-practice processes. That's what EVOLVE is all about.

Thanks for joining us at our inaugural Technology and User Conference. We've called the conference 'EVOLVE' as it reflects our mission and commitment to the EMS and NEMT industry.

We believe that our software products and services must constantly evolve.

And we're glad you're part of it.

### About Traumasoft

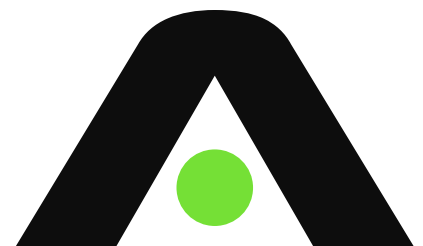
Traumasoft was built with the input and expertise of actual EMS owners, operators, and employees. Pairing real world EMS professionals with a team of expert developers resulted in a solution capable of managing every facet of an EMS or NEMT operation.

With an inherent belief that software is only as good as the problems that it solves, Traumasoft continuously solicits and implements user feedback and suggestions from existing clients. We believe the future of world-class EMS software lies in innovation and collaboration.

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## EVOLVE Sponsors



## About Kissimmee and Gaylord Palms

### Kissimmee has been a Florida favorite for generations.

World-famous theme parks. Shopping, dining, boating, biking, golfing, and fishing. Year-round sunshine, great accommodations, and friendly people. It's all part of the Kissimmee experience. And it's why year after year, friends and families come to Kissimmee for memories that last them a lifetime.

Located just 25 minutes from Orlando International Airport (MCO), Kissimmee, Fla., is a home to a quiet township with links to Orlando and all that's on offer nearby.

It's perfectly positioned for outdoor adventures or to explore

the world-famous theme parks – you and the family will have plenty to do and see.

You'll experience the adrenaline rush of twisting rollercoasters and the thrill of seeing beloved characters at Walt Disney World® Resort, Universal Orlando Resort, SeaWorld® Parks & Resorts™, and LEGOLAND® Florida Resort. You can also zip line over gators at Gatorland, meet a sloth at Wild Florida, and see our natural world from an airboat at Boggy Creek Airboat Adventures or above on a hot air balloon ride.

(Be sure to check out the Walt Disney World® offer in this program.)



### Gaylord Palms Resort & Convention Center

Located in beautiful Central Florida, Gaylord Palms Resort & Convention Center welcomes guests to an upscale, one-of-a-kind experience only minutes from Walt Disney World®, Universal Orlando Resort™, and other Orlando theme parks and attractions. From Cypress Springs Water Park with our new Crystal River Rapids action river, to an exciting lineup of family-friendly activities and entertainment, there's something for everyone to enjoy.

Explore four-and-a-half acres of indoor garden atriums, nine

award-winning restaurants, bars, the world-class Relâche Spa, and a state-of-the-art fitness center.

Discover family-friendly thrills at Cypress Springs Water Park or an oasis of relaxation at South Beach Pool. Gaylord Palms Resort & Conference Center in Kissimmee, FL, offers fun water activities around every corner and the perfect location near Orlando for more theme park action.

Discover distinctive fine-dining at our hotel with nine restaurants and sports bars near Disney Springs. Savor the memories and flavors for a lifetime.

Our exclusive day spa treatments and therapies, infused with natural elements from the garden and delivered with flawless professionalism, will ignite the senses and soothe the soul. The Relâche Spa Fitness Center offers a full array of cardio, strength, functional and free weight fitness



equipment. Large floor-to-ceiling windows provide beautiful views of our resort.

Outside of attending EVOLVE, Gaylord Palms offers a range of activities for everyone.





### J. Todd Sheridan

J. Todd Sheridan will be joining us as the keynote speaker at EVOLVE on Monday.

For those unaware, Mr. Sheridan is a seasoned EMS leader with expertise in operations, finance and strategic planning. Mr. Sheridan's consulting projects have ranged in size from smaller community initiatives to large urban high-performance EMS systems.

His skills include assessment and strategic planning, data analysis, operational performance improvement, financial modeling, and staff development. He previously served as the firm's contracted Director of Operations for Robert Wood Johnson University – EMS/ Mobile Health Services.

**FITCH**  
A ASSOCIATES



### Scott A. Moore

Scott A. Moore will be speaking at EVOLVE on a variety of topics. He has been in the emergency medical services field for over 31 years. Scott has held various executive positions at several ambulance services in Massachusetts. He'll talk about Medicare Cost Accounting among other important topics at the Wednesday afternoon session.

Scott is a licensed attorney, specializing in Human Resources, employment and labor law, ambulance service reimbursement, and corporate compliance matters. He is a Human Resources & Operational Consultant to the American Ambulance Association (AAA) and he created Newton 360, a performance feedback and operational efficiency mobile platform designed specifically for EMS agencies.

**moore**  
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### Stephen R. Wirth, Esq., EMT-P

Steve Wirth is a founding partner of Page, Wolfberg & Wirth, the National EMS Law Firm representing EMS agencies from all sectors throughout the United States. He is a dynamic and engaging national speaker whose presentations address a wide range of EMS legal, compliance, workplace, and leadership topics. In a distinguished four-decade public safety career, Steve has worked in virtually every facet of EMS (both volunteer and career) from the ground up and was one of central Pennsylvania's first paramedics. Steve is an adjunct professor for the University of Pittsburgh EMS degree program and was a past chair of the Panel of Commissioners for CAAS, the national ambulance service accrediting body. Steve serves on the board of the National EMS Memorial Service, is a member of the NAEMT Lighthouse Leadership Mentorship Project, and is an active participant in the National EMS Memorial Bike Ride – the "Muddy Angels."

Page  
Wolfberg  
& Wirth

## Speakers



### Christopher Kelly

Christopher Kelly is an attorney with the law firm of Page, Wolfberg & Wirth which focuses on the ambulance industry. He writes regularly for EMS World and sits on the magazine's editorial advisory board. He has been an adjunct instructor for Virginia College, teaching Legal Aspects of Healthcare Administration and Health Law and Ethics.

Chris represents many ambulance services in Medicare audits and formal investigations, state licensing issues, contracting issues, overpayment appeals and other EMS related matters, winning several cases that have had major impact on ambulance reimbursement in the U.S. He is also a contributor to various other EMS publications and is a frequent lecturer at state and national EMS meetings and conferences.



### Brian S. Werfel, Esq

Brian S. Werfel, Esq. is a partner in Werfel & Werfel, PLLC, a New York based law firm specializing in reimbursement and compliance issues affecting EMS providers.

Brian is the Medicare Consultant to the American Ambulance Association, and is the author of the AAA's Medicare Reference Manual, the AAA's HIPAA Compliance Manual, and a co-author of the AAA's Compliance and Documentation Manuals. Brian is also a frequent lecturer at national and state EMS conferences. Brian is a graduate of the University of Pennsylvania and the Columbia School of Law.



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### Omar Masri

Omar Masri is a software entrepreneur and is currently the founder and CEO of Mamori.io, a cybersecurity solutions company. He is also a director of a data migration and security services company and is co-incubating a non-emergent transport market services start-up.

Omar works with businesses and helps them deal with the ever-growing cost and complexity of cybersecurity – preventing attacks, meeting compliance and cyber insurance requirements.



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## Speakers from Traumasoft



### **Brian Balow**

#### **Co-founder and CEO, Traumasoft**

Brian has worked in EMS for 35+ years - in the field as a medic, and then 25 years as the CEO of a small community service that grew into a medium-sized operation serving multiple counties in Southwest Michigan. He also started and operated a successful website design and development firm. Brian leads product, customer support, IT and training at Traumasoft.



### **Mike Coffman**

#### **Co-founder and COO, Traumasoft**

Michael has worked in enterprise software for 30+ years, spending his operational career with Quest Software, BMC Software and Oracle. Michael subsequently became a venture partner with Toba Capital. He served in the US Army and has an MBA from Indiana University's Kelley School of Business. Michael leads sales, marketing, finance and business development at Traumasoft.



### **Shawn Oosterlinck**

#### **CTO, Traumasoft**

Shawn has been Chief Technology Officer of Traumasoft since its inception in 2008. As such, Shawn is responsible for customer and internal computing infrastructure, security and compliance. He also leads a number of product and organizational initiatives. Shawn served in the US Air Force as a network operator.



### **Ricky Powell**

#### **Senior VP, Solutions Consulting, Traumasoft**

Ricky is an innovative thinker with a broad-based expertise in operations, finance, and business development. Ricky's experience as a Firefighter, Medic, Marketing Manager, Communications Manager, Billing Manager, Operations Manager, Executive, Board of Directors, and Owner over the last three decades has given him a vast knowledge of the EMS industry at every level. Ricky utilizes innovative approaches, data analytics and technology to create successful outcomes to complex situations.



### **Sherri Hardewig**

#### **Executive Revenue Consultant, Traumasoft**

Sherri has worked in the EMS Billing industry for 30+ years and owned the largest 911 EMS Billing Company in Ohio until 2015. She has taken a lead role in growing Versatile Revenue Management, Traumasoft's billing company platform. Sherri has a strong focus on processes and procedures to help maximize client's overall revenue.



### **Rob Stone**

#### **VP Customer Success, Traumasoft**

Robbie Stone has over 25 years' experience in the Information Technology field and nearly 15 years in EMS. Over the years, he has worked in over 50 dispatch centers in 11 states. Robbie has also worked with over 30 ambulance billing centers helping to streamline operations, create real-time analytics, and improve efficiencies.

## Speakers from Traumasoft



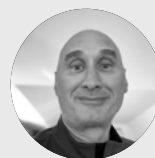
**M. Justin Kinsey**  
Sales Manager, Traumasoft

Justin has had a diverse career in emergency services — 8 years as the general manager of a commercial ambulance service, 20 active years as a volunteer firefighter and EMT; a year and a half as a contract firefighter working overseas (Iraq and Antarctica), 12 years as an EMS instructor; and various stints working with a highway traffic emergency response team and with an EMS regulatory oversight organization. Justin was recently named as one of the American Ambulance Association's 2021 '40 Under 40 Award' honorees.



**Gerry Hocks**  
Software Consultant, Traumasoft

Gerry is a software engineer with over 37 years' experience. He has worked in Australia, the US, Japan, and the UK, in a broad range of areas including Data Monitoring & Migration, Industrial Control Systems, Computational Linguistics, Game Design & Development, and Machine Learning. He has been contributing to Traumasoft for the last three years, building the Real Time Routing service, the new Chat service, the new Dispatch Chat UI, the new GPS Server, and the GPS+ App.



**Chris Vattimo**  
Sr. Vice President of Sales, CRO, Traumasoft

Chris is a Western New York native, born and raised. He started in the wireless business, serving as General Manager for Nextel and Sprint in their Public Sector divisions. Chris has spent the last 12 years in the EMS software industry and currently serves as Chief Revenue Officer and SVP for Traumasoft.



## Come for EVOLVE stay for the magic

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## Charlie Coffman

**Mobile Apps Project Manager,  
Traumasoft**

Charlie leads our new mobile app development team currently focused on Traumasoft's Employee App and Ryde Central Patient App. Charlie brings expertise in building social apps and is the creator of Stamp Social.



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A healthcare professional, likely a nurse or doctor, is shown from the chest up, looking intently at a tablet. The background is dark with a green digital network pattern of lines and dots. A red pill-shaped button is positioned above the main headline.

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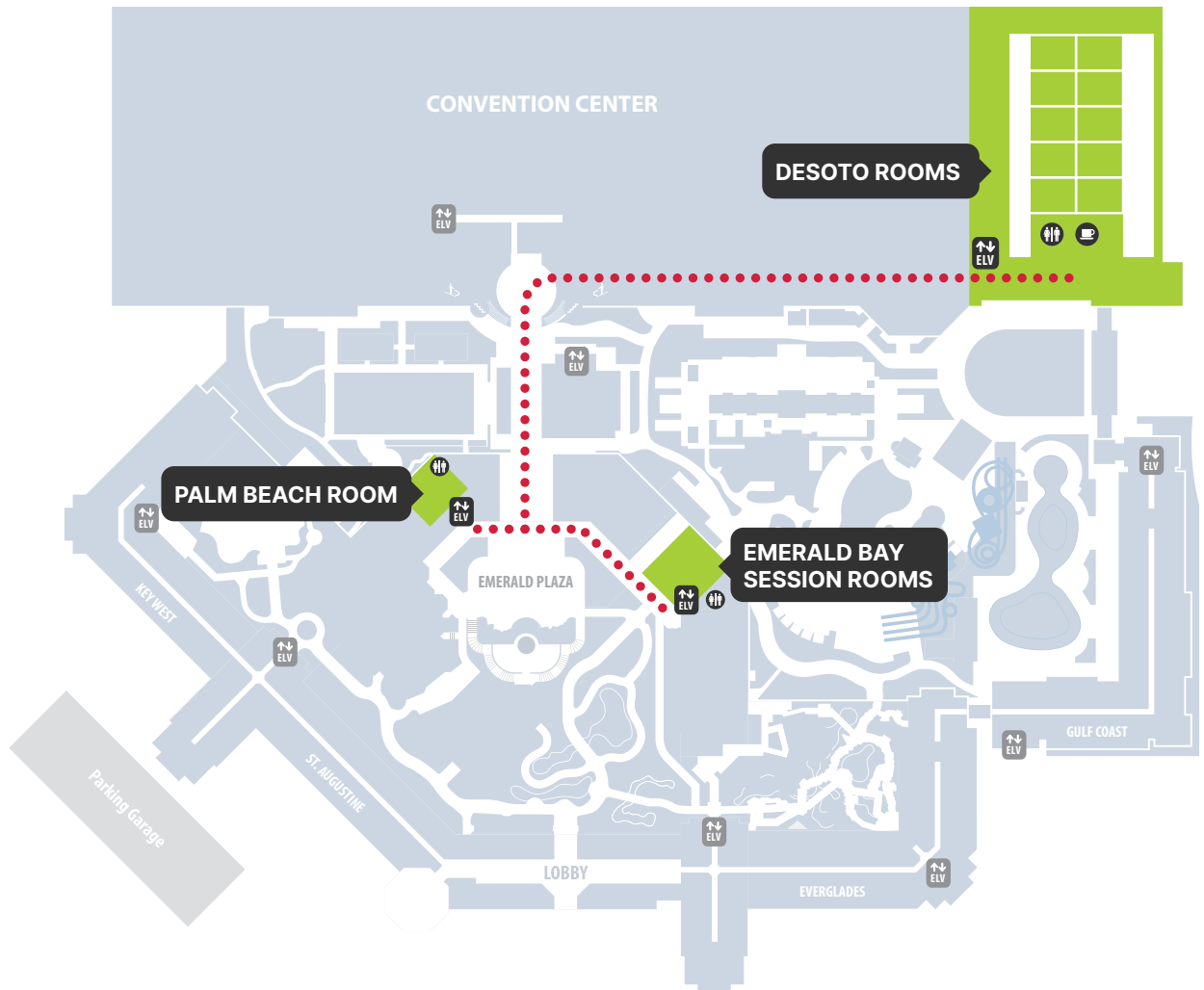
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[banquest.com/traumasoft](https://banquest.com/traumasoft)

## Event Map



The session rooms and Desoto rooms are on the first floor and well-signposted. It's a short walk from one to the other. Bathrooms and other facilities are located around the complex.





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# Main Sessions

DAY 1		
7 - 8:00	Breakfast & Registration	Desoto Ballroom
8:15	Welcome & Conference Kickoff - Traumasoft Team	Desoto Ballroom
9:45 - 12:00	Billing - Sherri Hardewig	Desoto Ballroom
12:15	Keynote - Fitch & Associates - J. Todd Sheridan	Desoto Ballroom
2:00	Banquest Integrated Payment Systems - Kevin Frisch	Desoto Ballroom
3:00	Nsure - Mike Ciullo	Desoto Ballroom
3:45	Waystar - Liz Lafitte	Desoto Ballroom
4:30	Cyber Security, Servers & Infrastructure - Omar Masri, Shawn Oosterlinck	Desoto Ballroom

DAY 2		
7 - 8:00	Breakfast	Desoto Ballroom
8:15	The "Super Six" EMS Legal Landmines - PWW - Steve Wirth & Chris Kelly	Desoto Ballroom
9:15	ePCR - Justin Kinsey	Desoto Ballroom
10:15	Dispatch/CAD - Justin Kinsey	Desoto Ballroom
12:15	RoundTable - PWW, Fitch & Associates, Moore Consulting, Werfel & Werfel - J. Todd Sheridan, Steve Wirth, Chris Kelly, Scott Moore, Brian Werfel, Brian Balow, Michael Coffman	Desoto Ballroom
2:00	Lynx EMS - Marshall Matthews	Desoto Ballroom
3:00-4:30	Scheduling/Payroll - Justin Kinsey	Desoto Ballroom
4:45	Mamori - Omar Masri	Desoto Ballroom

**DAY 3**

<b>7 - 8:00</b>	<b>Breakfast</b>	<b>Desoto Ballroom</b>
<b>8:15</b>	<b>Autonomous Contact Center / Ryde Central</b> - Mike Sechrist, Ricky Powell	<b>Desoto Ballroom</b>
<b>9:15</b>	<b>RealTime Routes</b> - Gerry Hocks	<b>Desoto Ballroom</b>
<b>10:15</b>	<b>Employee App/UI</b> - Charlie Coffman & Jeremy Laird	<b>Desoto Ballroom</b>
<b>11:15</b>	<b>Using Data as a Recruit &amp; Retain Tool</b> - Scott Moore	<b>Desoto Ballroom</b>
<b>12:15</b>	<b>Cost Accounting - Moore Consulting &amp; Werfel &amp; Werfel</b> - Scott Moore, Brian Werfel	<b>Desoto Ballroom</b>
<b>2:00</b>	<b>Solutions Group</b> - Brian Choate	<b>Desoto Ballroom</b>
<b>2:45 - 4:00</b>	<b>Reporting, Analytics and AI</b> - Ricky Powell, Rob Stone	<b>Desoto Ballroom</b>
<b>4:15</b>	<b>Conference Wrap-up</b> - Traumasoft Team	<b>Desoto Ballroom</b>

**TRAINING / TECH-LABS**

	<b>Daily:</b> <b>Morning - 9:15am – 12pm</b> <b>Afternoon - 2pm – 5pm</b>  Traumasoft will have team members ready to provide one-on-one training on any topic presented during our breakout sessions. If there are any specific question that need to be addressed, please stop by, and take advantage of this special opportunity. We will have workstations setup with the ability to access your individual build to provide real-time feedback about system features.	<b>Palm Beach Room</b>
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## VIP, Networking & Roundtable Sessions

DAY 2		ROOM
7 - 8:00	Breakfast	Desoto Ballroom
8:15	The "Super Six" EMS Legal Landmines - PWW - Steve Wirth & Chris Kelly	Desoto Ballroom
9:15 - 12:00	Round Table Networking, Special Session - Traumasoft Executive Team	Desoto 5
12:15	RoundTable - PWW, Fitch & Associates, Moore Consulting, Werfel & Werfel - J. Todd Sheridan, Steve Wirth, Chris Kelly, Scott Moore, Brian Werfel, Brian Balow, Michael Coffman	Desoto Ballroom
2:00 - 5:00	Round Table Networking, Special Session - Traumasoft Executive Team	Desoto 5
6:30 - 9:30	Dinner with Executive Team - Traumasoft Executive Team	Celebration FL

**DAY 3**

<b>7 - 8:00</b>	<b>Breakfast</b>	<b>Desoto Ballroom</b>
<b>8:15</b>	<b>Autonomous Call Center / Ryde Central</b> - Mike Sechrist, Ricky Powell	<b>Desoto Ballroom</b>
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## Course Descriptions

### Autonomous Call Center (ACC) / Ryde Central

8:15-9:00AM / DAY 3

Autonomous Call Center (ACC) or Ryde Central is an online and mobile platform that automates the workflow for requesting patient transportation for healthcare professionals. Whether you are in an access/transfer center, a social worker, case manager, nurse, or any other staff member that sets up transportation, it simplifies the approval, request, and access to all levels of transportation services within a healthcare system.

**Presented by Michael Sechrist and Ricky Powell**

### Cyber Security

4:30-5:15PM / DAY 1

Everything you need to know to “actually” secure your business from cyberattacks. You will obtain a step-by-step guide that covers all the best practice guidelines recommended by federal agencies (Federal Trade Commission, Homeland Security, USA SBA, NIST), and each step will be linked to real world attacks they cover. Additionally, attendees will get an understanding of security solution misconceptions and limitations, allowing them to better identify and cover their current security gaps.

**Presented by Omar Masri**

### Realtime Routes

9:15-10:00AM / DAY 3

Realtime Routes is smart, automated and flexible non-emergent medical transport scheduling platform that maximizes capacity and minimizes disruption. Gerry will present upcoming features to include new configuration options, setting shift and call-type routing priorities, and CAD grid integration.

**Presented by Gerry Hocks, Software Consultant, Traumasoft**

### Billing

9:45AM-12PM / DAY 1

This session will cover a variety of important billing processes and functions to increase efficiencies and overall performance. Attendees will learn how to maximize productivity in claims processing, setting charges using Payor Overrides and Default Charges, Posting Payments in various ways within the system, using System Management Profit Centers and Reporting, as well as discussing industry standards of

Productivity and Visibility to compare where current insufficiencies may lie within individual companies.

**Presented by Sherri Hardewig**

### Scheduling/Payroll

3:00-4:30PM / DAY 2

New features will be demonstrated using real-life scenarios. Increase your efficiency by learning new tips and tricks. Review configuration options and how to properly implement them.

**Presented by Justin Kinsey**

### Reporting, Analytics and AI

2:45-4:00PM / DAY 3

It is vitally important to understand your data and use it correctly. Becoming a data-driven business is easier said than done. This session will focus on how to use your Traumasoft data to drive your business forward. We will look at best practices when it comes to utilizing the reporting module, internal dashboards, and other available resources. The goal is to give your team visibility to your data so your business stays in constant focus. Data is the pulse of your business, and utilized correctly, answers to difficult questions become clear and simple.

**Presented by Rob Stone and Ricky Powell**

### ePCR

9:15-10:00AM / DAY 2

Presenting our New ePCR! This session will provide an overview of our New ePCR layout, functionality, and key features, as well as different ways that it can be configured. A focused look at several specific functionalities including: field/table customization, logic rules, conditional visibility, and much more.

**Presented by Justin Kinsey**

### Dispatch/CAD

10:15AM-12:00PM / DAY 2

#### PART 1

In this Advanced Training Part 1 session, attendees will learn how to efficiently utilize various data-points to ensure data quality, increase the efficiency of call takers and dispatchers, and populate accurate and effective reports. The topics discussed will include: Tags, Sub-zones, Geo-fences, Natures, and Notes.

#### PART 2

In this Advanced Training Part 2 session, attendees



## Course Descriptions

will learn important ways to prevent human errors related to dispatching, increase the awareness of dispatchers to time-base events, and decrease the decision-making time related to initial assignment of Trips. A focus will be placed on Hierarchy Profiles, GPS "Show on Map," Alerts, and Overdue Checking and Advance Compliance Checking.

### PART 3

This session is all about Viewing and Communicating Information. There are various ways to restrict the information viewed by users, and even more ways to communicate information to users and facilities. The content focus of this session will include: CAD Views and CAD Filters, Vehicle Status Board, Related User Admin Configurations, Trip 'Contact' Information, and Notifications.

**Presented by Justin Kinsey**

### À la Carte Training Lab Sessions

Traumasoft expert trainers and developers will be available for more detailed instruction and exploration following the topics covered through the general breakout sessions.

If you are seeking more information, or have complex questions that need to be addressed, then take advantage of a session within the training lab which will be covering the following modules:

**HR/People Ops** – 9:15-10:00

**Fleet Ops** – 10:15-11:00

**Scheduling** – 11:15-12:00

**Billing** – 2:00-2:45

**EPCR** – 3:00-3:45

**CAD** – 4:00-4:45

**Open, any module** – 5:00-8:00

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**What's my responsibility?**  
**Who's transporting?**  
**Why are there always delays?**  
**What's a PCS?**  
**What about patient privacy?**  
**Ambulance or cab?**

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