President’s Message

Hi FWIA members,

The April 7th full day seminar on “Fraud & Embezzlement: Lessons From the Trenches”, presented by Angela Morelock was fantastic!! Evaluations were unanimously rated excellent!

Health benefit cost control is an important and timely topic for auditors. The May 9th lunch meeting will be presented by Richard M. Stohl, CPA. Richard has extensive health benefits administration audit and cost control experience and is a recognized authority in the field. In the morning Richard will present “Keys to Successful Auditing Health Benefits Administration” and in the afternoon Richard will present “Ten Ways Internal Auditors can help Control Health Benefit Costs.” Please see below for further details on our May meeting, speaker and topics.

REMEMBER: The Fort Worth Chapter of the IIA will be giving away two (2) FREE registrations to the IIA’s Learning seminars offered in Dallas

June 27-30, 2017
and

REMEMBER!!!

Our meetings and seminars are open to members and nonmembers, so if you have coworkers, staff or friends that you think could benefit from our training opportunities, please invite them.

Debbie
May 2017 FW IIA Monthly Meeting

Keys to Success in Auditing Healthcare Benefits Administration
and
Ten Ways Internal Audit can assist in controlling Health Benefits Cost
Richard M. Stohl, CPA

(See next page for speaker bio and session descriptions)

**Start Date/Time:** 5/9/2017 10:30 AM  
**End Date/Time:** 5/9/2017 1:30 PM

**Location:** Petroleum Club–Ft Worth | Texas

Prerequisites: None

CPE: 2 Hours

Lunch will be provided!

If you have any questions, please contact Lee Hagelstein at Lee.Hagelstein@arlingtontx.gov

Click here to **Register**

Our meetings are held at the Fort Worth Petroleum Club. ([www.fwpetroleumclub.com](http://www.fwpetroleumclub.com))  
It is a great downtown location with beautiful views from the 40th floor.

We highly recommend advance registration. Walk-ins availability may be limited.

If you experience difficulty with our website, you can register directly with Lee Hagelstein at Lee.Hagelstein@arlingtontx.gov
SPEAKER BIO

Richard M. Stohl, CPA
Director of Audit Services, QBA Consulting Corporation

Richard M. Stohl has extensive health benefits administration audit and cost control experience and is a recognized authority in the field. He is the co-founder and president of QBA Consulting Corporation, which specializes in quantitative benefits administration audits, claims analysis, and consulting on cost controls and program stewardship. He was formerly Auditor-In-Charge with the Office of Inspector General, U.S. Office of Personnel Management, Washington, D.C. where he was responsible for auditing the Federal Employees Health Benefits Program ("FEHBP") the largest employer-sponsored health benefits program in the country.

For over twenty-five years, Stohl has helped corporate, government and non-profit clients identify millions of dollars of cost overcharges, payment errors, and establish practical methods and procedures to reduce future problems. Stohl designed and implemented his company’s Medical Analysis and Review System ("MARS"), which evaluate claim adjudication system controls by identifying payment errors, overcharges, and other anomalies in the claim universe.

He has written numerous articles and lectured on subject. He is the co-developer and instructor of the Institute of Internal Auditors, Inc. (“IIA”)’s Health Benefits Administration Auditing profession development seminar.

Richard is a Certified Public Accountant and has earned the Health Insurance Associate (“HIA”) and Managed HealthCare Professional (“MHP”) designations from the Health Insurance Association of America (“HIAA”). He is a member of the American Institute of CPAs and The Institute of Internal Auditors, Inc. He has a BA in Accounting from San Diego State University and a MS in Business Financial Management from George Washington University. Mr. Stohl served on the Executive Committee of the Texas HealthCare Anti-Fraud Association from 1991 – 1999.

TOPICS

Keys to Success in Auditing

The high cost of inefficiency, provider overcharges, payment errors, and fraud and abuse in health benefits warrants more than casual oversight of the program’s administration. Millions of dollars in savings can be earned when internal auditors help their organizations to “watch the store”. Assisting in the control of health benefits cost has become an extremely high profile area where internal auditors can enhance their image as a value-added service to their organization. One way internal auditors can achieve cost savings, recover overcharges, and minimize financial exposures is to familiarize themselves with methods for controlling health benefits cost in high exposure areas in claims administration. This presentation will provide an overview of health benefits administration process and look at the risks and exposures in HBA. The presentation will also provide key suggestions for internal auditors in evaluating the oversight within their organization and how to audit the controls at their claims administrator.

Ten Ways Internal Auditors Can Assist in Controlling Health Benefits Costs

Health care and related benefits administration has always been considered high-risk areas. The United States General Accounting Office (GAO) has consistently included the Medicare program in the Government’s high-risk series. This high-risk exposure is not limited to government programs. Internal auditors in the private sector have found that effective audits of health benefits administration can result in significant cost recoveries and promote future cost savings for their organizations. Assisting in controlling health benefits is one high profile area where internal auditors can enhance their image as a value added service to their organizations. This presentation will provide an overview of ten areas that internal auditors have assist their organizations by identifying opportunities for cost savings, recover overcharges, and minimized financial exposures.
Upcoming Events

7:45 am, Tue, May 9, 2017 - CAE meetings
If you are a CAE and haven’t been contacted about attending our CAE meetings, please contact Michelle Atkins, matkins@JPSHealth.org, our CAE Chair.

10:30 am - 1:30 pm, Tue, May 9, 2017 - Monthly Meeting  (2 CPEs)
Richard M. Stohl — Keys to Success in Auditing—Health Benefits Administration.

8:00 am - 5:00 pm, June 27 –30, 2017 — IIA Learning Seminars in Dallas  (16 CPEs)
MicroTek Training Facility (see website for details)

8:00 am - 5:00 pm, Aug 22—25, 2017— IIA Learning Seminars in Dallas  (16 CPEs)
MicroTek Training Facility (see website for details)
Upcoming Events

2017 IIA International Conference

When: July 23–26, 2017

Where: Sydney, Australia

Join us for The IIA's 76th annual International Conference, July 23–26 in Sydney, Australia, as we explore the land down under and “L.I.V.E. the Global Experience.”

HOT TOPICS – This event will focus on timely global issues through an exciting and relevant program featuring 10 educational tracks plus an additional one-day track designed for Audit and Risk Committee Members.

OUTSTANDING SPEAKERS – Connect with world-class speakers who will share insights on matters impacting the profession, and enjoy specific sessions designed to allow greater interaction between these thought-leaders and conference delegates.

SOMETHING FOR EVERYONE – With more than 70 educational sessions to choose from, internal audit professionals – from CAEs and heads of internal audit, to directors, managers, and audit staff – can customize a program that is right for them.

NETWORKING – Network and share best practices with 1,500+ colleagues from more than 100 countries.

EARN CONTINUING PROFESSIONAL EDUCATION (CPE) CREDITS – Maintain your IIA certifications by earning your CPE credit requirements.

LOCATION – From the pristine beaches and botanical gardens to the Harbor Bridge, Sydney Opera House, Taronga Zoo, and more, Sydney is a stunning destination that is not to be missed.

VENUE – The newly constructed International Conference Centre Sydney is located within the city's vibrant business, cultural, and entertainment district and is the ideal platform to collaborate, learn, and innovate.

Mark your calendar now and complete the form to sign up to receive exciting conference developments.
IIA Members Only Webinar Series

**Don’t miss these opportunities for free CPE**

The IIA’s webinars are free informational programs available in both live and on-demand formats for 24/7 access. Webinars provide viewers with a cost-effective and convenient way to immediately boost business know-how. Downloadable presentation materials are available for each webinar.

*Topics and dates are subject to change.*

Upcoming Webinars

16-May-2017

Members-only Webinar: A Blueprint: Strategizing Your Anti-fraud Approach

27-June-2017

Members-only Webinar: Strengthening an Organization’s Risk Culture: IA Can Play a Critical Role
CAP Reporting

Our goal is nothing short of Platinum! We’ve already reached Gold for four years in a row!

Overview

Chapter Achievement Program (CAP) is a chapter benchmarking tool that provides guidelines for expected performance at the chapter level. The IIA sponsors the CAP as a way to recognize and encourage local chapters to participate in activities that promote the overall IIA and chapter objectives and membership growth. The chapter earns points by participating in activities that support its members, the profession, and the community.

IIA currently offers four levels of CAP performance. A chapter can advance from one level to the next by accumulating the points noted below:

- BRONZE – 685 CAP Points
- SILVER – 1,060 CAP Points
- GOLD – 1,560 CAP Points
- PLATINUM – Special level to recognize chapters that attain GOLD status for 10 of 11 consecutive years.

CAP points are earned for our accomplishments in three service categories:

- Service to Members
- Service to the Profession
- Chapter Administration

How can you help us reach our goal?

- Any speaking engagement on internal auditing for which CPE was awarded, date, location and number of CPE
- Submit articles to be published in the Internal Auditor (extra points for getting published!!!)
- Submit articles to be published in other professional journals
- Serve on an IIA Quality Review Team
- Submit exam questions for CIA
- Teach in Junior Achievement

These are few examples. If you have performed any of the above, please email our President, Debbie Egly at debbie.egly@fwisd.org with details.
Fund Internal Audit Research and Education

Can We Count On Your Support?

Internal audit’s future is supported in two ways — knowledge and education. Research fuels deeper knowledge and understanding of emerging issues and establishing long-term solutions, while academic relations supports internal audit education to fuel a pipeline of new and stronger talent to address the emerging issues of tomorrow.

The IIA Research Foundation (IIARF) and The IIA’s Internal Auditing Academic Advancement Fund (IAAAF) were established specifically to address these ongoing and equally important initiatives.

Our charitable foundations solely exist to cultivate quality internal audit educational programs and relevant research. Our work is only made possible through generous contributions and investments in the future of the profession.

Pulse of Internal Audit

Since 2009, The IIA’s Audit Executive Center has conducted annual Pulse of Internal Audit surveys to assess the state of the internal audit profession and identify trends and emerging issues in the profession and with its stakeholders.

Embracing Opportunities in a Dynamic Environment
Publication date: July 2015

Emerging risk is not slowing down ... it’s accelerating. And CAEs are expected to adapt quickly to addressing those risks. The 2015 Global Pulse of Internal Audit report analyzes data from more than 4,500 CAEs and directors from around the world to provide a look at the challenges and opportunities present for internal audit in today’s dynamic business environment and identifies four major themes CAEs must have on their radar.
Unlock Your Door to Opportunity:

CIA Designation

The Certified Internal Auditor (CIA) designation is the only globally accepted certification for internal auditors and remains the standard by which individuals demonstrate their competency and professionalism in the internal auditing field.

If you decided to open the door to this professional opportunity, the Fort Worth Chapter can help.

The IIA’s CIA Learning System® is an interactive Certified Internal Auditor® (CIA®) review program combining reading materials and online study tools with optional facilitator-led courses to teach and reinforce the entire global CIA exam syllabus in a flexible, on-demand format.

CIA Program at Rice University

Rice University partners with the Institute of Internal Auditors to offer a three-part live, instructor-led online Certified Internal Auditor® (CIA®) program taught by Vicki McIntyre www.glasscock.rice.edu/cia

Our expert instructor will deliver live, scheduled lectures via the Internet, covering the global CIA exam syllabus and materials included in the IIA’s CIA Learning System™. Earning the CIA designation is more than just proof of what you know and what you have achieved — it’s the best way for auditing professionals to communicate to the world that they are prepared to meet today’s challenges.
Student Memberships

Students remember that you get **2 free monthly meetings** when you **join the IIA as a member of the Fort Worth chapter**. You pay only $35 to join the IIA as a student, then the Fort Worth chapter pays for you to attend 2 monthly meetings. Net cost for your membership to you becomes just $5!!! For $35 you mingle with potential employers, get more connected with the Internal Auditing profession, and get 2 great meals for which our professional members pay $35 each. After you have had your 2 free meals, future meetings cost you only $15. Sign up today at [www.theiia.org](http://www.theiia.org)!!

Member Profiles

Be sure to update your personal profile with IIA headquarters. We plan to offer some new features this year that you will want to take full advantage of, and the only way to do that is to ensure your contact information is correct with headquarters.

Calling all CAE’s

If you are a CAE and haven’t been contacted about attending our CAE meetings, please contact Michelle Atkins, [matkins@JPSHealth.org](mailto:matkins@JPSHealth.org), our CAE Chair. As a CAE, you have proven your ability to lead; come join us and help lead our chapter into a bright future!
Certifications Corner eNews

Over the next few meetings, we will have Gleim booklets that contain information about the CIA testing process and the Gleim CIA exam study materials. Interested candidates can pick up a copy at the sign in table at the next meeting.

The Fort Worth Chapter has partnered with Gleim CIA Review to ensure your success on the CIA exam!

Gleim CIA Review is the most widely used CIA prep course. More CIAs have used Gleim to pass the CIA Exam than all other prep courses combined. The exceptional content now includes over 40 hours of in-depth video lectures and comprehensive question test banks that cover all of the topics tested and are presented in a format that replicates your exam-day experience. In addition, CIA candidates enjoy a no-hassle Access Until You Pass® Guarantee and customized support from a team of CIA exam prep experts.

As a member of the chapter, you are eligible for a 10-20% discount on Gleim CIA Review Systems. To take advantage of the reduced prices and to place your order, log into the Members Only section of the Chapter website.

Please contact our Gleim representative, Melissa Leonard with any questions regarding the Gleim materials or discounts available. Call her at 800.874.5346 or via email IIAChapters@gleim.com.
Membership Corner

We would like to extend our warmest welcome to our newest members:

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<thead>
<tr>
<th>Name</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desiree Ramirez</td>
<td>University of North Texas System</td>
</tr>
<tr>
<td>Kristin Weems</td>
<td>TD Ameritrade Holding Corporation</td>
</tr>
<tr>
<td>Tracy Grunig</td>
<td>University of North Texas System</td>
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Please introduce yourself and welcome them to the Fort Worth Chapter.

Advertise with us !!!

Employment advertisements may be placed on the Ft. Worth IIA website.

All submittals should be sent via email in finalized format and preferably using Microsoft Office Software.

IIA members may post jobs for free. All other postings are $50 for one month or $100 for 3 months. Contact Roshan Jayawardene at: Roshan.Jayawardene@arlingtontx.gov

Contribute to our newsletter

We welcome articles and suggestions for our newsletter. Please send your newsletter article contributions to be featured in our next edition to our editor.

The Fort Worth Chapter of the Institute of Internal Auditors

Contact Us

The Fort Worth Chapter of the Institute of Internal Auditors

President: Debbie Egly
Vice President: Elijah Metcalf
Treasurer: Liana Hadjigeorgiou
Secretary: Tevi Lawson

Visit us on the web at:
https://chapters.theiia.org/fort-worth/
Or
www.fwiia.org