

 **UFINITY**
2026

CENTER

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STAGE

 **UNLIMITED**
SYSTEMS



A Message From Our CEO

Welcome to Nashville — and welcome to UFinity 2026.

We're grateful you've chosen to spend the next few days with us.

UFinity represents more than a new name for our national conference. This year's event intentionally reimagines how we bring the Unlimited Systems community together and create greater value from the time we spend with one another.

Throughout UFinity, you'll experience the investments we're making across our technology, our client experience, and our people. These priorities reflect our continued commitment to evolving alongside our customers and strengthening how we support organizations like yours that rely on Unlimited Systems every day.

Just as importantly, UFinity provides an opportunity for us to hear directly from you. I encourage you to engage with the people behind our technology and services, learn alongside peers who understand the unique challenges of specialty healthcare, and share your own experiences and perspectives with them and my colleagues.

That is why we've designed UFinity to put **you, our customers, Center Stage**.

Our goal is for the value of your time at UFinity to extend well beyond these few days in Nashville. You will depart this experience with new knowledge, meaningful connections, and ideas you can take back to your organization — creating a return well beyond the investment you've made to be here. We'll begin this evening with our **UFinity Welcome Reception**, and I hope you'll join us as we kick off the conference and spend time with fellow attendees and the Unlimited Systems team.

Thank you for your continued partnership and trust in Unlimited Systems. We're excited about where we're headed, the investments we're making, and the opportunity ahead of us to succeed together.

Welcome to UFinity. We're glad you're here.

Warm regards,

A handwritten signature in dark blue ink, appearing to read 'Brian Gockerman', with a stylized, flowing script.

Brian Gockerman
Unlimited Systems | Chief Executive Officer

Sunday, November 1st

- 12:00 PM - 8:00 PM  REGISTRATION
- 6:00 PM - 8:00 PM  WELCOME RECEPTION

Monday, November 2nd

- 7:30 AM - 8:00 AM  BREAKFAST NETWORKING
- 8:00 AM - 9:30 AM  UNLIMITED & YOU - TOOLS AND CONNECTIONS TO WIN
- 9:40 AM - 10:20 AM  ELECTIVE SESSION 1
- 10:30 AM - 11:10 AM  ELECTIVE SESSION 2
- 11:20 AM - 12:00 PM  LUNCH
- 12:00 PM - 12:45 PM  KEM TOLLIVER - KEYNOTE SPEAKER
- 12:55 PM - 1:35 PM  ELECTIVE SESSION 3
- 1:45 PM - 2:25 PM  ELECTIVE SESSION 4
- 2:35 PM - 3:15 PM  ELECTIVE SESSION 5
- 3:25 PM - 4:05 PM  ELECTIVE SESSION 6
- 4:15 PM - 4:45 PM  AI LIKE IT'S 2026
- 4:45 PM - 5:00 PM  UFINITY DAY ONE CLOSING
- 5:00 PM - 5:30 PM  SPONSOR SHOWCASE
- 5:45 PM - 10:00 PM  EVENING EVENT AT THE COUNTRY MUSIC HALL OF FAME

Tuesday, November 3rd

- 7:30 AM - 8:00 AM  BREAKFAST NETWORKING
- 8:00 AM - 8:10 AM  UFINITY WELCOME BACK
- 8:15 AM - 8:55 AM  ELECTIVE SESSION 7
- 9:05 AM - 9:45 AM  ELECTIVE SESSION 8
- 9:55 AM - 10:35 AM  ELECTIVE SESSION 9
- 10:45 AM - 11:35 AM  UF ROADMAP REVIEW
- 11:35 AM - 12:00 PM  CUSTOMER AWARDS & UFINITY CLOSING
- 12:00 PM - 1:30 PM  CSM KPI REVIEW SESSIONS



The Listening Room



Cannery Hall



The Bluebird Café



RCA Studio B



The Station Inn

ELECTIVE SESSION 1 | MONDAY, 9:40 AM - 10:20 AM

The Exchange Zone - Closing The Gap Between Treatment Decisions & Treatment Access
Sponsor Showcase

Custom Interventions in UF
Peer-Led Session

Unlimited Financials: Key Concepts & Workflows
UF Fundamentals

Advanced Rule Configuration: Driving Workflow Performance
Advanced Application

AI in Unlimited Financials: Real-World Applications (Pt 1)
Innovation Session

ELECTIVE SESSION 2 | MONDAY, 10:30 AM - 11:10 AM

Remittance to Reconciled - Closing the Final Loop
Sponsor Showcase

Alleviating Administrative Burden: Strategies for Efficiency, Compliance & Financial Stability
Sponsor Showcase

Setting the Stage: Building Effective Pre-Visit Workflows
UF Fundamentals

Driving Results: Optimizing Pre-Visit Workflows for Reimbursement
Advanced Application

AI in Unlimited Financials: Real-World Applications (Pt 2)
Innovation Session

ELECTIVE SESSION 3 | MONDAY, 12:55 PM - 1:35 PM

Missing Links: Optimizing the Post-Prescription Patient Journey
Sponsor Showcase

Change Management Fundamentals for Practices
Innovation Session

Getting Scheduling & Patient Intake Right
UF Fundamentals

Advanced Scheduling Strategies
Advanced Application

Defining What's Next: 2027 Roadmap Planning (Pt 1)
Innovation Session

ELECTIVE SESSION 4 | MONDAY, 1:45 PM - 2:25 PM

AI's Role in Prior Authorizations & Financial Assistance
Sponsor Showcase

Mastering the Challenge of the Revenue Cycle
Peer-Led Session

Keeping Authorizations & Referrals on Track
UF Fundamentals

Advanced Strategies for Authorizations & Referrals
Advanced Application

Defining What's Next: 2027 Roadmap Planning (Pt 2)
Innovation Session

ELECTIVE SESSION 5 | MONDAY, 2:35 PM - 3:15 PM

AI in Cancer Care: Smarter Patient Engagement & Clinical Intelligence — Built for the Practice You Run Today
Sponsor Showcase

Additional Revenue Streams Through RPM, RTM, PIN, & PCM
Peer-Led Session

Building Strong Activity Capture & Charge Review Workflows
UF Fundamentals

Configuring Activity Capture & Charge Review for Performance
Advanced Application

Month-End Closing Roundtable
Innovation Session

ELECTIVE SESSION 6 | MONDAY, 3:25 PM - 4:05 PM

The Last Mile of RCM: Why Patient Pay is the New Revenue Cycle Battleground
Sponsor Showcase

Power BI Reporting: Navigating the Report Library
UF Fundamentals

Charge Assembly: Foundations for Daily Workflows
UF Fundamentals

Charge Assembly Management: Prioritizing What Matters Most
Advanced Application

Eligibility Roundtable
Innovation Session

ELECTIVE SESSION 7 | TUESDAY, 8:15 AM - 8:55 AM

Data, Dollars & DC: COAnalyzer Financial Insights & Oncology Policy Updates
Peer-Led Session

Working Rejections with Confidence
UF Fundamentals

Advanced Rejection Analysis & Prevention
Advanced Application

Designing the Future of Patient Engagement (Pt 1)
Innovation Session

ELECTIVE SESSION 8 | TUESDAY, 9:05 AM - 9:45 AM

AI in Specialty Care: Lessons from the Frontlines
Sponsor Showcase

Turning Accounts Receivable into Reimbursement
UF Fundamentals

Denial Prevention Through Data-Driven Analysis
Advanced Application

Designing the Future of Patient Engagement (Pt 2)
Innovation Session

ELECTIVE SESSION 9 | TUESDAY, 9:55 AM - 10:35 AM

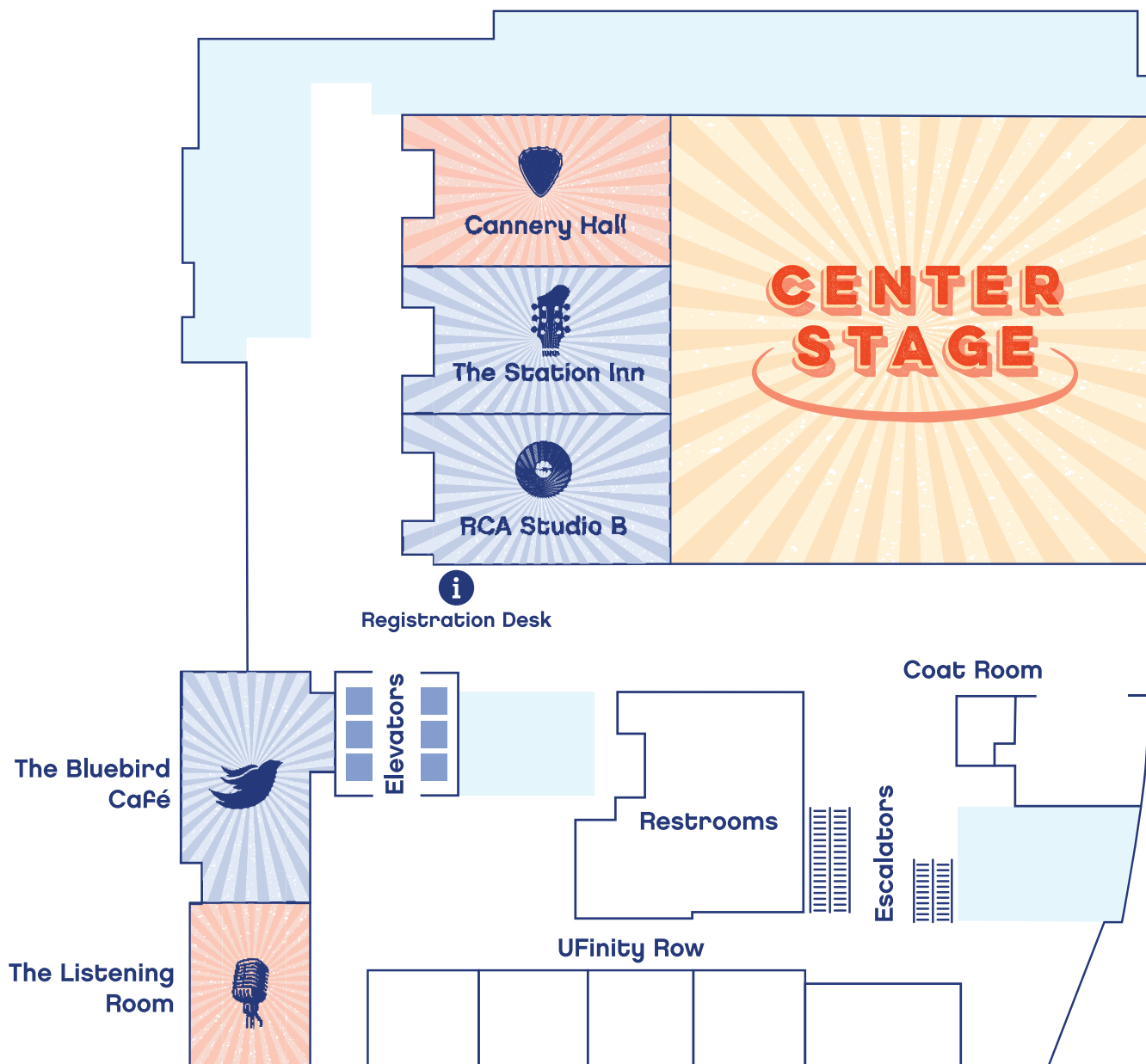
Change Management Fundamentals for Practices
Innovation Session

Customer Experience Roundtable
Innovation Session

Advanced Power BI: Driving Better Insights
Advanced Application

Unlimited AR Roundtable
Innovation Session





CENTER STAGE

Inspired by the Grand Ole Opry.

Since 1925, the Grand Ole Opry has welcomed legendary performers and rising stars to one of the world's most recognizable stages. For over a century, it has brought people together to celebrate excellence, share stories, and shape the future of country music.

Like the Grand Ole Opry, UFinity is where the entire Unlimited Financials community comes together. Throughout UFinity, Center Stage will host keynote presentations, important announcements, and conversations that inspire new ideas, strengthen partnerships, and help shape the future of specialty healthcare.

Cannery Hall

Built on History. Designed for the Future.

Originally constructed as a flour mill in the early 1900s, Cannery Hall has been thoughtfully transformed into one of Nashville's premier live entertainment venues. Its restored architecture reflects the city's ability to honor its past while continuously reinventing itself.

Unlimited Financials has followed a similar path, building on decades of trusted experience while continually evolving to meet the changing needs of specialty healthcare practices. Every session at UFinity reflects our shared commitment to innovation, growth, and long-term partnership.

The Station Inn

Honoring Tradition. Inspiring Tomorrow.

Since opening in 1974, The Station Inn has become Nashville's premier bluegrass venue, known for preserving musical traditions while welcoming new artists and fresh perspectives. Despite Nashville's growth, it remains one of the city's most authentic gathering places.

The most successful organizations share a similar balance, respecting proven practices while embracing change. UFinity provides an opportunity to exchange ideas, explore new approaches, and continue moving specialty healthcare forward together.

RCA Studio B

Where Innovation Was Recorded.

Located on Nashville's historic Music Row, RCA Studio B opened in 1957 and became one of the most influential recording studios in American music. More than 35,000 songs, including hundreds recorded by Elvis Presley, were created within its walls, forever changing the sound of a generation.

Innovation doesn't happen by accident. It happens when people are willing to challenge convention, explore new ideas, and continuously improve. That same spirit drives Unlimited Financials and the conversations taking place throughout UFinity.

The Bluebird Café

Where Great Ideas Begin.

Hidden in an unassuming Nashville shopping center, the Bluebird Café has earned worldwide recognition as the place where songwriters collaborate, test new ideas, and launch remarkable careers. With fewer than 100 seats, it proves that meaningful conversations often happen in the smallest rooms.

Many of the ideas shared during UFinity will begin the same way, through open discussion, collaboration, and the willingness to learn from one another. Those conversations often become the ideas that shape our products, our partnerships, and the future of specialty healthcare.

The Listening Room

Every Story Matters.

The Listening Room is known for creating an atmosphere where audiences come to hear not only the music, but the stories behind it. Many songs first performed here eventually become chart-topping hits, but they all begin with someone willing to share an idea.

At UFinity, every client has a story worth sharing. Whether discussing challenges, celebrating successes, or exploring new opportunities, the conversations that begin here help shape the future of our products, our services, and our community.



Kem Tolliver

President & CEO • Medical Revenue Cycle Specialists

Kem Tolliver, BS, FACMPE, CPC, CMOM, is a nationally recognized revenue cycle leader with more than 20 years of experience.

**SEE KEM ON DAY 1 AT 12:00 PM
IN CENTER STAGE!**



Ricky Newton

Chief Financial & Operating Officer • Community Oncology Alliance

Ricky Newton, CPA is a seasoned healthcare finance and operations executive with over 29 years of experience in oncology practice management.

**SEE RICKY ON DAY 2 AT 8:15 AM
IN CANNERY HALL!**



Tonia Bateman

Senior Director of Billing • New Mexico Oncology Hematology

Tonia Bateman, CPC, ROCC, is a seasoned leader in oncology and multi-specialty revenue cycle management with more than 30 years of experience.

**SEE TONIA ON DAY 1 AT 2:35 PM
IN CANNERY HALL!**



Brian Gockerman

Chief Executive Officer • Unlimited Systems

As CEO of Unlimited Systems, Brian Gockerman leads with strategic vision and growth, building meaningful industry partnerships and staying connected to customers and their evolving needs.

**SEE BRIAN ON DAY 1 AT 8:00 AM IN
CENTER STAGE, & DAY 2 AT 11:35 AM
IN CENTER STAGE!**



Angela Ryce

Senior Vice President of Revenue Cycle • IVX Health

Angela Ryce has more than 20 years of healthcare management experience, leading revenue cycle optimization to drive quality goals.

**SEE ANGELA ON DAY 1 AT 1:45 PM
IN CANNERY HALL!**



Joe Gockerman

Chief Operating Officer • Unlimited Systems

Joe Gockerman has more than 20 years of experience leading software development teams and building customer value.

**SEE JOE ON DAY 1 AT 8:00 AM &
AT 4:15 PM IN CENTER STAGE!**



Jackie Sendewicz

RCM Systems Administrator • Radiation Business Solutions

Jackie Sendewicz brings 10 years of experience in revenue cycle management, analytics, and consulting for oncology and multi-specialty practices.

**SEE JACKIE ON DAY 1 AT 9:40 AM
IN CANNERY HALL!**



Fiona Peoples

VP of Product • Unlimited Systems

Fiona Peoples is Vice President of Product at Unlimited Systems, bringing more than 12 years of experience and leadership within the organization.

**SEE FIONA ON DAY 1 AT 8:00 AM IN
CENTER STAGE & DAY 2 AT 10:45 AM IN
CENTER STAGE!**



Daniela Higgins

VP of Customer Experience • Unlimited Systems

Daniela Higgins serves as Vice President of Customer Experience, bringing 17 years of experience and a deep understanding of our customers, operations, and evolving needs.

**SEE DANIELA ON DAY 1 AT 8:00 AM
IN CENTER STAGE!**



Brenton Hughes

Manager of Customer Success • Unlimited Systems

Brenton Hughes has been with Unlimited Systems for 7 years, building meaningful client relationships and driving customer success.

**SEE BRENTON ON DAY 1 AT 8:00 AM
IN CENTER STAGE!**



Eliza Fox

Director of Data Operations • Unlimited Systems

Eliza Fox is our Director of Data Operations, with 11 years at Unlimited Systems she has a passion for integration that drives value for our customers.

**SEE ELIZA ON DAY 1 AT 8:00 AM
IN CENTER STAGE!**



Matt Knudsen

Sr. Strategic Account Manager • Unlimited Systems

Matt Knudsen joined Unlimited Systems in 2026 as a Sr. Strategic Account Manager, bringing a relationship-focused approach to understanding customer priorities and supporting their long-term success.

**SEE MATT ON DAY 1 AT 8:00 AM
IN CENTER STAGE!**



Brian Epp

Chief Information Security Officer • Unlimited Systems

Brian Epp is a seasoned IT and cybersecurity leader who built security programs from the ground up, bringing that expertise as Unlimited Systems Chief Information Security Officer.

**SEE BRIAN ON DAY 1 AT 8:00 AM
IN CENTER STAGE!**



Grant Walters

Learning & Development Manager • Unlimited Systems

Grant Walters leads Learning & Development at Unlimited Systems, helping staff and clients build skills that drive real results.

**SEE GRANT ON DAY 1 AT 8:00 AM
IN CENTER STAGE!**



Taylor Schmitz

Director of Solution Delivery • Unlimited Systems

Taylor Schmitz serves as Director of Solution Delivery at Unlimited Systems, leading teams across project management and implementation consulting.

**SEE TAYLOR ON DAY 1 AT 8:00 AM
IN CENTER STAGE!**

Check out all our Headliners and speakers on our app!



Scan the QR code to download the Cvent app, then copy the link when prompted to find the UFinity 2026 event.

On the app you'll find the rest of our speakers, all of our sessions, and more!

Morning Networking and Keynote:

 **BREAKFAST NETWORKING | 7:30 AM**

 **UNLIMITED & YOU - TOOLS AND CONNECTIONS TO WIN | 8:00 AM**

CENTER STAGE

Breakout Session 1 | 9:40 AM

SPONSOR SHOWCASE

THE LISTENING ROOM



The Exchange Zone — Closing the Gap Between Treatment Decisions & Treatment Access

Presenter: Stuart McMahan, CIO, AllyGPO

This “Ted Talk”-style presentation will address the challenges practices face from the moment a physician assigns a treatment plan until the patient arrives for their first treatment. We'll examine the operational and clinical friction points that cause delays in this critical window — and the real impact those delays have on patients and practices alike. Attendees will leave with a clear understanding of how our new AI-driven platform, Sapient Relay, reduces treatment decision-to-access time from days to minutes.

You Will Learn:

-  Why the window between treatment decision and first appointment is one of the highest-risk moments in a patient's care journey and what's actually causing the delays.
-  How operational and clinical friction compounds across teams, systems, and handoffs to turn a straightforward process into a days-long bottleneck.
-  How AI-driven tools like Sapient Relay are collapsing treatment decision-to-access time from days to minutes and what that means for both patient outcomes and practice efficiency.

PEER-LED SESSION

CANNERY HALL



Custom Interventions in UF

Presenter: Jackie Sendewicz, RCM Business Administrator, Radiation Business Solutions

Take control of your custom workflows by leveraging Interventions in Unlimited Financials. This session provides an in-depth look at how to design, implement, and track a custom Intervention, and how Radiation Business Solutions has used this feature to streamline existing processes and strengthen quality monitoring. Leave with a clear roadmap for building Interventions that fit your practice's unique needs.

You Will Learn:

-  How to design, implement, and track custom Interventions within Unlimited Financials to support your practice's unique workflows.
-  How to identify within your existing processes where Interventions can reduce manual effort and strengthen quality monitoring.



UF FUNDAMENTALS

**Unlimited Financials: Key Concepts & Workflows**

Presenter: Patrick Hamelberg

Get ready to take the stage with confidence by attending our Unlimited Fundamentals session. Designed to provide a strong foundation, this session covers essential terminology and core methodologies. If you're new to the platform, you'll leave with the clarity and context needed to get the most out of every session throughout UFinity.

You Will Learn:

- ▶ Key terminology used in Unlimited Financials and how core platform features work together.
- ▶ How administrators can leverage workflows for cross-team task assignment, reducing reliance on external communication to complete actions.

ADVANCED APPLICATION

**Advanced Rule Configuration: Driving Workflow Performance**

Presenters: Quinn Dutton & Jim Burwinkel

Take a deeper dive in this interactive, hands-on session designed for advanced Unlimited Financials users. You'll work directly through advanced rule configuration fundamentals — building the technical fluency needed to navigate complex scenarios with confidence. Prepare for your performance at UFinity as we set you up for success in subsequent hands-on labs where rule configuration is a primary focus. *This is a working session, bring your laptop.*

You Will Learn:

- ▶ How to create and configure Unlimited Financials Behaviors and Sets, and understand how they work together within the platform.
- ▶ Standard behavior capabilities, their intended outcomes, and common pitfalls to avoid.
- ▶ When advanced behavior types are appropriate and when platform customizations may be needed to meet your practice's needs.

INNOVATION SESSION

**AI in Unlimited Financials: Real-World Applications (Pt 1)**

Presenters: Johnathon Trout, Matt McKean, David Bontrager, & Emma Celek

AI is everywhere, now let's do a sound check to determine how it can play at your practice! Join this interactive workshop to explore how AI can be incorporated into the Unlimited Financials platform to streamline workflows and surface smarter insights. Bring your ideas, share your challenges, and be part of the conversation shaping how we build AI into the tools you use every day.

You Will Learn:

- ▶ How AI-assisted features in Unlimited Financials could reduce manual effort or improve accuracy, removing pain points in your practice's financial operations.
- ▶ Practical AI use cases that evaluate and determine which apply most to your practice's size, specialty, or current challenges.
- ▶ Actionable ideas for AI functionality grounded in your real-world billing and financial management experience.

Breakout Session 2 | 10:30 AM

SPONSOR SHOWCASE

THE LISTENING ROOM



Remittance to Reconciled — Closing the Final Loop

Presenter: Morris White, Director of Channel Success, MediStreams

Healthcare providers lose significant staff time manually matching ERA/835 files, paper EOBs, and bank deposits to close out their AR. It's a process prone to errors, delays, and disconnected data across banks, clearinghouses, and practice management systems. This session walks through how MediStreams works with Unlimited to automate the reconciliation workflow end-to-end.

You Will Learn:

- ▶ How MediStreams and Unlimited work together to automate the reconciliation workflow end-to-end, connecting banks, clearinghouses, and practice management systems into a single, seamless process.
- ▶ Why manual payment reconciliation across ERAs, paper EOBs, and bank deposits creates compounding errors and AR delays that cost practices more than they realize.

SPONSOR SHOWCASE

CANNERY HALL



Alleviating Administrative Burden: Strategies For Efficiency, Compliance & Financial Stability

Presenters: Travis Heimbuch, MBA, VP of Provider Channel Partners, Vince Maher, Director of Business Development, & William Koerber, VP of Clearinghouse Services, Data Dimensions

As documentation demands grow and payer requirements evolve, administrative workflows can quietly become one of the greatest threats to efficiency and financial stability. This session explores how document-driven processes, billing workflows, referrals, outside records, and audits, impact daily operations and reimbursement, and offers practical strategies to reduce that burden. You'll leave with modern approaches that improve visibility, strengthen audit readiness, and support faster, more accurate claims processing.

You Will Learn:

- ▶ The key drivers of administrative burden, including document-heavy communication, audit demands, and multi-payer billing complexity, and identify the workflow inefficiencies that impact staff productivity and reimbursement timelines.
- ▶ Best practices for modernizing document management and clinical communication, and discuss strategies to improve claims accuracy through better visibility, routing, and documentation processes.
- ▶ Operational approaches that support both compliance and financial performance without disrupting the delivery of patient care.



UF FUNDAMENTALS

**Setting the Stage: Building Effective Pre-Visit Workflows***Presenter: Jordan Lobsiger*

Let us help you warm up for patient financial success well before they walk through the door. This session explores the essential workflows in Unlimited Financials, including Coverage Verification, that lay the groundwork for a smooth financial experience from first contact through final payment. You'll leave with a clearer picture of how proactive financial processes protect both your patients and your practice's bottom line.

You Will Learn:

- ▶ How to navigate the Coverage Verification workflow process and identify opportunities to optimize CV performance.

ADVANCED APPLICATION

**Driving Results: Optimizing Pre-Visit Workflows for Reimbursement***Presenter: Lora Pennington*

Join us for an advanced, interactive session focused on maximizing pre-visit workflows within Unlimited Financials. We'll dive into Coverage Verification rule configuration and explore strategies for optimizing reimbursement through effective upfront patient collections. Come ready for the show, this session is designed to help advanced users get more out of the tools they already have.

You Will Learn:

- ▶ How to configure Pre-Visit Validation rules to automatically capture and validate insurance information upfront, reducing manual effort and improving data accuracy before the patient arrives.
- ▶ How to strategize behavior settings that balance comprehensive coverage verification with minimizing unnecessary friction in the patient experience.
- ▶ How to identify gaps in your Coverage Verification workflow and recommend targeted optimizations that strengthen both verification outcomes and upfront collections.

INNOVATION SESSION

**AI in Unlimited Financials: Real-World Applications (Pt 2)***Presenters: Johnathon Trout, Matt McKean, David Bontrager, & Emma Celek*

AI is everywhere, now let's do a sound check to determine how it can play at your practice! Join this interactive workshop to explore how AI can be incorporated into the Unlimited Financials platform to streamline workflows and surface smarter insights. Bring your ideas, share your challenges, and be part of the conversation shaping how we build AI into the tools you use every day.

You Will Learn:

- ▶ How AI-assisted features in Unlimited Financials could reduce manual effort or improve accuracy, removing pain points in your practice's financial operations.
- ▶ Practical AI use cases that evaluate and determine which apply most to your practice's size, specialty, or current challenges.
- ▶ Actionable ideas for AI functionality grounded in your real-world billing and financial management experience.

Lunch Networking and Keynote Speaker:

 **LUNCH NETWORKING | 11:20 AM**

 **KEYNOTE SPEAKER: KEM TOLLIVER | 12:00 PM**

CENTER STAGE

Breakout Session 3 | 12:55 PM

SPONSOR SHOWCASE

 **THE LISTENING ROOM**



Missing Links: Optimizing the Post-Prescription Patient Journey

Presenter: Megan Marchal, PharmD, Director of Partnerships, Cinnamon Health

Join Cinnamon Health for a walkthrough of the medication journey, link-by-link, showing where specialty practices lose patients and revenue. Learn how Cinnamon's platform keeps up with administrative tasks and avoid revenue loss by streaming and connecting to AI to facilitate benefits verification, approval processes, affordability, and adherence.

You Will Learn:

-  Where and why the medication journey breaks down between prescription order and first dose.
-  How real-time pharmacy and medical benefit and AI-assisted human-in-the-loop prior authorization flow reduce work while keeping clinical judgment with your staff.
-  How Cinnamon's Coverage Waterfall, proprietary affordability engine, runs concurrently with prior authorization submission, rather than after a denial, expedite a patient's time to therapy.

INNOVATION SESSION

 **CANNERY HALL**



Change Management Fundamentals For Practices

Presenters: Blair Arcaini & Grant Walters

People management at healthcare practices is subject to continuous change — but it doesn't always have to be painful. This session equips practice leaders and supervisors with practical frameworks and strategies for reducing staff resistance, building buy-in, and guiding teams through transitions with confidence. Whether you're navigating a new platform rollout or broader organizational shifts, you'll leave with the tools to make change stick — and earn something closer to a standing ovation than a missed cue.

You Will Learn:

-  Core change management principles and explain how they apply to the unique dynamics of a healthcare practice environment.
-  Key obstacles and stressors that drive staff resistance to change and articulate why they occur.
-  Tangible strategies and approaches you can put to work immediately to manage change more effectively at your practice.



UF FUNDAMENTALS

**Getting Scheduling & Patient Intake Right***Presenter: Jordan Lobsiger*

This classroom-style session walks you through the Scheduling and Intake workflows within Unlimited Financials, covering the key steps that shape a patient's experience from first contact through arrival. You'll learn how to configure and navigate these workflows to reduce friction, minimize errors, and keep your front desk running smoothly. By the end, you'll have a clear plan for creating a streamlined, efficient intake process that sets both staff and patients up for success.

You Will Learn:

- ▶ The fundamentals of the scheduling platform in Unlimited Financials and how it shapes downstream workflows across the system.
- ▶ How to navigate Scheduling and Intake workflows both independently and in combination, leveraging the unique tools available when the two are used together.
- ▶ Scheduling validation rules, focusing on previous appointment validation and Azure functions.

ADVANCED APPLICATION

**Advanced Scheduling Strategies***Presenter: Lora Pennington*

Join us for an advanced, interactive session focused on Scheduling in Unlimited Financials. We'll take a deeper look at features like Guided Scheduling and how advanced behavior configuration can automate and streamline your scheduling process from end-to-end. Come ready to use your voice, this session is built for users looking to get more precision and efficiency out of the tools they use every day.

You Will Learn:

- ▶ How to configure Guided Scheduling to enforce advanced scheduling behaviors aligned with your practice's workflows and business rules.
- ▶ How to design Guided Scheduling templates that balance standardized processes with the clinical flexibility your team needs.
- ▶ How Guided Scheduling features impact appointment accuracy, no-show rates, and the overall patient experience.

INNOVATION SESSION

**Defining What's Next: 2027 Roadmap Planning (Pt 1)***Presenters: Johnathon Trout, Matt McKean, David Bontrager, & Emma Celek*

Take the stage and make your voice heard. In this interactive session with the Unlimited Financials product team, you'll collaborate directly on roadmap development and share the feedback that guides future innovation. This is your opportunity to influence what comes next, bring your biggest ideas and boldest asks.

You Will Learn:

- ▶ How your practice's financial and billing workflow challenges can inform future Unlimited Financials product priorities.
- ▶ How upcoming roadmap initiatives may address your practice's needs and goals, and where your feedback can help shape future development.
- ▶ How your priorities compare with those of your peers, including common challenges and opportunities that may influence the future direction of the platform.

Breakout Session 4 | 1:45 PM

SPONSOR SHOWCASE

THE LISTENING ROOM



AI's Role in Prior Authorizations & Financial Assistance

Presenters: Jessica Blagg, Senior Vice President, Provider Solutions, Chad Zerangue, Vice President & General Manager, Kalyn Khalaf, Senior Director, Enterprise Growth, & Ben Blake, Senior Director, Enterprise Provider Sales, CareMetx

Drawing on CareMetx research and current industry data, this session offers a grounded view of what automated technology can and can't yet do well in financial onboarding of patients, and where human judgment still needs to lead.

You Will Learn:

- ▶ What current industry data and CareMetx research reveal about the real state of AI adoption in financial clearance, including where automation is delivering results and where it's still falling short.
- ▶ Why human judgment remains essential in authorization decisions, and how to think practically about where AI fits today versus where the field still needs to catch up.

PEER-LED SESSION

CANNERY HALL



Mastering the Challenge of the Revenue Cycle

Presenter: Angela Ryce, Senior Vice President of Revenue Cycle, IVX Health

This session focuses on best practices for timely claims filing, follow-up, and prompt cash posting and bank reconciliation. You'll learn how to review denial trends to correct issues upstream in your revenue cycle, and why tracking metrics like DSO and bad debt are essential to your practice's financial health. By the end, you'll have concrete strategies to ensure your practice captures and keeps every dollar it's earned.

You Will Learn:

- ▶ Best practice applications for timely claims filing, follow-up, and cash posting to reduce delays and keep your revenue cycle moving.
- ▶ Denial trends analysis to identify root causes and correct upstream billing issues before they impact reimbursement.
- ▶ How to use DSO and bad debt metrics to measure your practice's financial performance and drive continuous improvement.



UF FUNDAMENTALS

 THE BLUEBIRD CAFE

Keeping Authorizations & Referrals on Track

Presenter: Scott Cecil

This classroom-style session walks you through the key workflows for maintaining authorizations and referrals within Unlimited Financials. You'll explore multiple approaches to managing these critical steps, so your team has the flexibility to handle them in a way that fits your practice's processes. By the end, you'll have all the stage direction you'll need to ensure authorizations and referrals are never overlooked, protecting both your patients and your reimbursement.

You Will Learn:

-  The functionality and behaviors that drive authorization and referral workflows within Unlimited Financials.
-  How to leverage Power BI to proactively monitor and manage expiring authorizations and referrals before they impact care or reimbursement.

ADVANCED APPLICATION

 RCA STUDIO B

Advanced Strategies for Authorizations & Referrals

Presenter: Lora Pennington

Join us for an advanced, interactive session focused on maximizing the effectiveness of authorization and referral processes within Unlimited Financials. We'll explore key features designed to streamline these workflows, including Unlimited AI: Authorization Denial Predictor, and how to put them to work for your practice. Come ready to engage; this session is built for users who want to move from the wings to the spotlight and maximize every authorization touchpoint.

You Will Learn:

-  How to employ Unlimited AI: Authorization Denial Predictor to proactively identify at-risk authorizations and referrals before they result in a denial.
-  Analysis of denial prediction patterns to determine which authorization scenarios require intervention or direct payer outreach.
-  Strategies for application of denial prediction insights to reduce denials and improve authorization approval rates across your practice.

INNOVATION SESSION

 THE STATION INN

Defining What's Next: 2027 Roadmap Planning (Pt 2)

Presenters: Johnathon Trout, Matt McKean, David Bontrager, & Emma Celek

Take the stage and make your voice heard. In this interactive session with the Unlimited Financials product team, you'll collaborate directly on roadmap development and share the feedback that guides future innovation. This is your opportunity to influence what comes next, bring your biggest ideas and boldest asks.

You Will Learn:

-  How your practice's financial and billing workflow challenges can inform future Unlimited Financials product priorities.
-  How upcoming roadmap initiatives may address your practice's needs and goals, and where your feedback can help shape future development.
-  How your priorities compare with those of your peers, including common challenges and opportunities that may influence the future direction of the platform.

Breakout Session 5 | 2:35 PM

SPONSOR SHOWCASE

THE LISTENING ROOM

AI in Cancer Care: Smarter Patient Engagement & Clinical Intelligence — Built for the Practice You Run Today

Presenter: Anupam Kashyap, VP Strategy, CureMD

The biggest operational and financial wins in oncology right now are not happening inside the exam rooms, they are happening before and after the patient encounter. This session covers two dimensions every operations leader, billing executive, and administrator in this room can act on.

You Will Learn:

- ▶ First, through our partnership with Unlimited Systems, Leap Health's AI-powered digital pre-registration, intake, payment, and AI Patient Contact Center are available to every practice here today, fully integrated with Unlimited Financials.
- ▶ Second, for organizations evaluating where oncology AI is heading, we will show how the next generation of AI-enabled EHR platform is transforming documentation, clinical trial matching, and more: capabilities that are live today, not on a roadmap.
- ▶ Attendees leave with a practical framework for deploying AI across patient engagement and clinical workflows at scale, starting immediately.

PEER-LED SESSION

CANNERY HALL

Additional Revenue Streams Through RPM, RTM, PIN, & PCM

Presenter: Tonia Bateman, Senior Director of Billing Office, New Mexico Oncology Hematology Consultants, Ltd.

This session introduces four supplemental, billable services for outpatient practices — Remote Patient Monitoring (RPM), Remote Therapeutic Monitoring (RTM), Principal Care Management (PCM), and Principal Illness Navigation (PIN). Drawing from one practice's real-world experience, we'll explore how these programs extend care beyond the office visit and support patients with chronic or serious conditions between appointments. You'll leave with a practical overview of each program's workflows, staffing, documentation, and billing potential.

You Will Learn:

- ▶ How RPM, RTM, PCM, and PIN work and identify the appropriate patient populations for each program.
- ▶ The workflows, staffing, documentation, and billing oversight needed to successfully launch and sustain these services at your practice.
- ▶ The clinical and financial value these programs offer, including how they capture reimbursement for work already being done while improving continuity of care and patient outcomes.



UF FUNDAMENTALS

**Building Strong Activity Capture & Charge Review WorkFlows***Presenter: Justin Merz*

This classroom-style session walks you through how activities and charges can be effectively worked and validated within Unlimited Financials. You'll explore the multiple workflows available for managing this process, giving you and your stage crew the flexibility to find an approach that fits your practice. By the end, you'll have a clear understanding of how to streamline charge validation and reduce the risk of missed or delayed reimbursement.

You Will Learn:

- ▶ How to distinguish between activity-level and charge-level workflows and identify the appropriate use case for each within your practice's daily operations.
- ▶ Why and where items stop within standard workflows — building the troubleshooting skills needed to keep your charge validation process running smoothly.

ADVANCED APPLICATION

**Configuring Activity Capture & Charge Review For Performance***Presenters: Maddie Koufoudakis & Brendan Kelly*

Join us for an advanced, interactive session on configuring rules within Unlimited Financials to maximize the effectiveness of your Activity Capture and Charge Review process. We'll go beyond the basics to explore how strategic rule configuration can reduce manual review, catch errors earlier, and keep charges moving cleanly through your workflow. It's a rehearsal for your setup designed to help you get more out of every charge!

You Will Learn:

- ▶ How to evaluate your current Activity and Charge Validation configuration within Unlimited Financials to identify gaps or inefficiencies in your existing workflow and rule setup.
- ▶ Configuration of rules within Unlimited Financials that align Activity and Charge Review processes to your practice's clinical and operational workflows.

INNOVATION SESSION

**Month-End Closing Roundtable***Presenters: Brenton Hughes & Johnathon Trout*

Join your peers for an interactive roundtable on month-end close. Come ready to represent your organization's processes, roles, and challenges as part of the discussion — comparing approaches, sharing what's working and what isn't, and learning from your peers. We'll also highlight recent and upcoming product enhancements designed to improve and shape the future of the month-end close experience.

You Will Learn:

- ▶ Compare month-end close processes and best practices with peers, and identify opportunities to improve your own.
- ▶ Understand recent and upcoming Unlimited Financials enhancements supporting month-end close.
- ▶ Share feedback and perspectives to help shape the future of the month-end close experience.

Breakout Session 6 | 3:25 PM

SPONSOR SHOWCASE

THE LISTENING ROOM

The Last Mile of RCM: Why Patient Pay Is the New Revenue Cycle Battleground

Presenters: Keenan Hartman, Director - Client Success and Onboarding, & Jason Holcomb, Vice President of Sales, PatientFocus

Health systems have done a lot of the hard work — eligibility checks, coding, claims, and automation. But once a bill lands in a patient's hands, even the best RCM strategies often stall. The good news? There's a real opportunity here. By treating patient pay as a true revenue cycle function, not just a collections task, health systems can recover more revenue while making the financial experience better for patients at the same time. Join us and we will explore these outcomes together.

You Will Learn:

- ▶ Why traditional RCM strategies, however strong on the front end, tend to fall apart at the patient pay stage, and what that gap is costing health systems.
- ▶ How reframing patient pay as a sophisticated revenue cycle function, rather than a collections activity, opens up new opportunities to recover revenue and improve the patient financial experience.

UF FUNDAMENTALS

CANNERY HALL

Power BI Reporting: Navigating the Report Library

Presenters: Patrick Hamelberg & Tyler Quackenbush

This session provides a foundational understanding of the Power BI report library available to all Unlimited Financials users. You'll learn how to navigate the library, identify the right reports for your needs, and begin interpreting the data to support better decision-making at your practice. By the end, you'll be a showstopper with the confidence to make Power BI a regular part of how you monitor and manage your revenue cycle.

You Will Learn:

- ▶ How to curate the right Power BI reports to run for your practice's key workflows and revenue cycle processes.
- ▶ The numerous built-in tools available within Power BI that help you filter, analyze, and act on your data more effectively.



UF FUNDAMENTALS

**Charge Assembly: Foundations For Daily Workflows***Presenter: Justin Merz*

This classroom-style session walks you through Charge Assemblies — one of the most essential tools in Unlimited Financials. You'll learn how to efficiently locate, navigate, and work within Charge Assemblies to get the most out of this core component of the platform. By the end, you'll have the foundational knowledge needed to use them with the confidence of a veteran performer in your day-to-day workflows.

You Will Learn:

- ▶ How to use Charge Assembly search to efficiently locate specific AR and claims information within Unlimited Financials.
- ▶ How to analyze last touch date and historical charge code data to compare paid versus denied claims and identify trends.
- ▶ How to apply Charge Assembly owners and the Summary card to streamline your claims follow-up process.

ADVANCED APPLICATION

**Charge Assembly Management: Prioritizing What Matters Most***Presenter: Maddie Koufoudakis*

Join us for an advanced, interactive session on how features like Charge Assembly Search can be used to personalize and enhance your workflows within Unlimited Financials. We'll explore how to build targeted searches, prioritize work effectively, and ensure your team stays focused on the highest-impact items in your AR. Come ready to engage — this hands-on session is designed for users looking to work smarter and get more precision out of the tools they use every day. ***This is a working session, bring your laptop.***

You Will Learn:

- ▶ How to navigate and configure Charge Assembly Search in Unlimited Financials to surface the highest-priority work items relevant to your practice's specific workflows.
- ▶ Application of prioritization strategies to your Charge Assembly Searches so your team stays focused on the items with the greatest financial and operational impact.

INNOVATION SESSION

**Eligibility Roundtable***Presenters: Dave Bontrager & Johnathon Trout*

Eligibility sets the tempo for everything downstream, so we're bringing it into the spotlight. Join your peers to sound off on what's working and what's off-key in UF eligibility today. React to early concepts for a fully reengineered experience, and explore where AI and smarter eligibility checks can catch authorization needs before they turn into denials.

You Will Learn:

- ▶ How Unlimited Systems is rethinking the eligibility experience and where the product is headed.
- ▶ Where AI can reduce the manual burden of eligibility verification in specialty healthcare workflows.
- ▶ How a stronger eligibility process can surface authorization needs earlier and prevent downstream denials.

Afternoon Keynote & Day One Closing:

CENTER STAGE

 AI LIKE IT'S 2026 | 4:15 PM

 DAY ONE CLOSING | 4:45 PM

Sponsor Showcase | 5:00 PM

Before the night's main act, swing by the sponsor booths, our partners have brought some things worth seeing! Stop in, say hello, then we'll see you at the Country Music Hall of Fame for dinner and fun.

GOLD SPONSORS

1 Data Dimensions



DATA DIMENSIONS™

Data Dimensions delivers technology-enabled services that streamline and automate manual healthcare processes and communications. Its solutions span clearinghouse connectivity, digital mailroom services, electronic payments, and workflow automation.

2 Cinnamon Health



Cinnamon is a single platform solution that simplifies medication access by managing pharmacy and medical benefit prior authorizations, financial assistance, and patient affordability programs. Provided at no cost to physician practices, Cinnamon automates repetitive tasks and thoughtfully utilizes pharmacist-trained AI to help improve workflows, grow revenue, and serve more patients.

3 Marvix AI



Marvix AI is a second-generation ambient AI assistant for specialty care. It supports the full clinical visit, from pre-charting with Patient Recaps that synthesize prior notes, labs, imaging, and history to AI scribing and post-visit coding. It creates specialty-specific notes in each provider's preferred language, structure, and style, with two-way EHR integration.

4 RxVantage



RxVantage connects physicians and their staff with life sciences experts for education on medical breakthroughs, technology, patient-support programs, and reimbursement resources — on demand and within their workflow. Trusted by more than 24,000 medical practices and all major life sciences companies, it powers more than one million educational exchanges each year.

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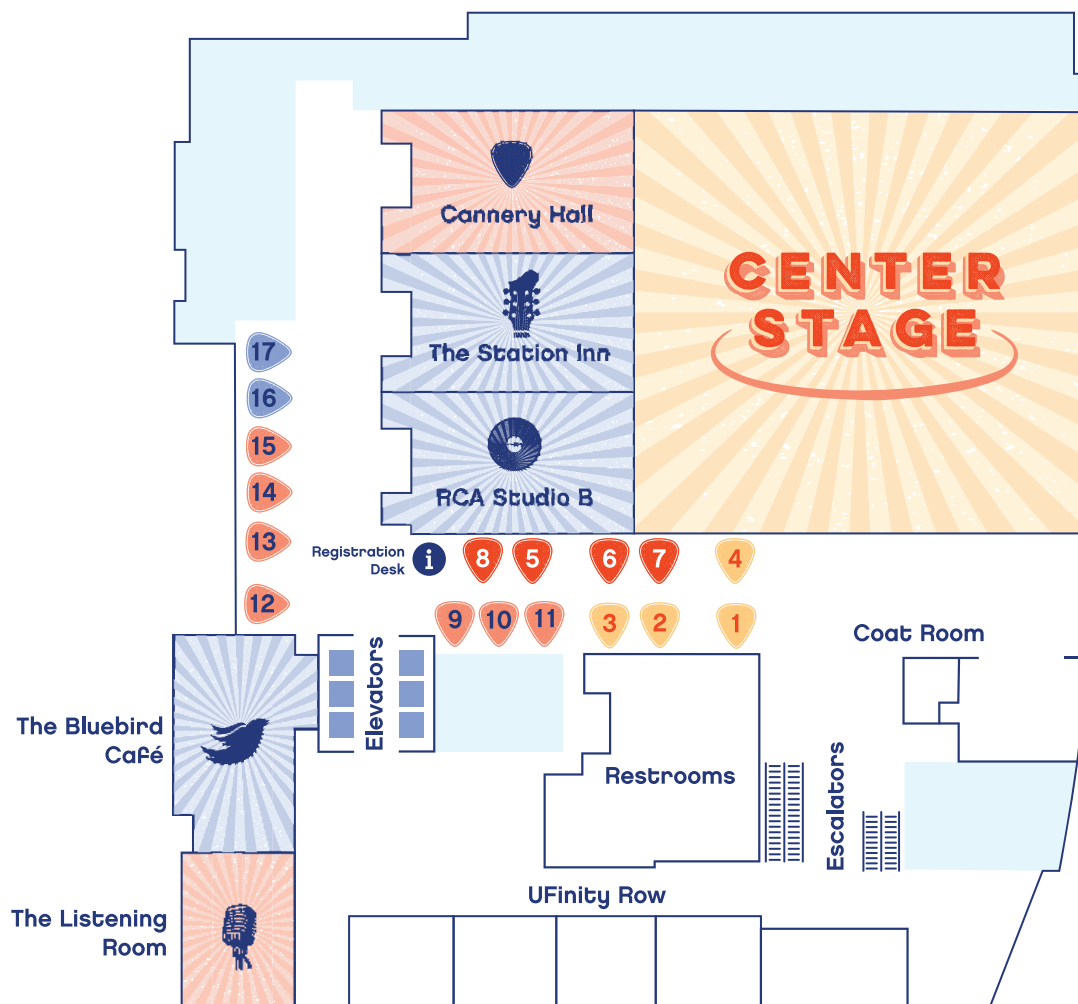
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EVENING EVENT

Country Music Hall of Fame

5:45 PM - 10:00 PM

JOIN US FOR LIVE MUSIC, TOURS, AND MORE!

Morning Keynote and Networking:

 **BREAKFAST NETWORKING | 7:30 AM**

 **WELCOME BACK | 8:00 AM**

CENTER STAGE

Breakout Session 7 | 8:15 AM

PEER-LED SESSION

 **CANNERY HALL**

Data, Dollars & DC: COAnalyzer Financial Insights & Oncology Policy Updates

Presenter: Ricky Newton, CPA, Community Oncology Alliance (COA)

Explore how COAnalyzer can help oncology practices better understand and manage their financial performance through revenue cycle management analysis, cost accounting, and Medicare reimbursement projections. The session will demonstrate how practices can identify their actual costs by CPT code to support payer contract negotiations, benchmark revenue cycle performance, and project the financial impact of upcoming Medicare reimbursement changes. The presentation will also review the proposed Medicare rule and its expected impact on oncology reimbursement in the coming year.

You Will Learn:

-  How oncology practices can move beyond surface-level financial reporting to understand their actual costs by CPT code and how that detail changes the way they approach payer contract negotiations.
-  How to benchmark revenue cycle performance and identify where your practice may be leaving money on the table.
-  What the proposed Medicare rule means for oncology reimbursement in the coming year and how to project its financial impact on your practice before it hits.

UF FUNDAMENTALS

 **THE BLUEBIRD CAFE**

Working Rejections with Confidence

Presenters: Jordan Lobsiger & Scott Cecil

This session focuses on building the skills and confidence needed to effectively manage rejections in Unlimited Financials. You'll learn how to identify, work, and resolve rejections within the platform, reducing delays and keeping your claims on track. By the end, you'll have a clear, repeatable process for handling rejections before they impact your revenue cycle.

You Will Learn:

-  How to identify and group rejections by type within Unlimited Financials and apply the appropriate resolution strategies for each.
-  Ways in which you can leverage behaviors to catch and correct issues before a claim is filed, reducing the likelihood of rejections at the source.

ADVANCED APPLICATION

RCA STUDIO B



Advanced Rejection Analysis & Prevention

Presenters: Quinn Dutton & Meredith Molony

Join us for an advanced look at performing in-depth analysis of your practice's rejections in Unlimited Financials. We'll explore how to identify patterns, uncover root causes, and translate those insights into targeted rule configurations that help prevent future occurrences. Be ready to hit your mark — this session is built for users who want to move from reacting to rejections to getting ahead of them.

You Will Learn:

- ▶ How to analyze the full scope of your practice's rejections to identify patterns and understand their impact on your revenue cycle.
- ▶ How to determine when and how recurring rejections can be translated into rule configurations that prevent future occurrences.
- ▶ Behavior sequencing and how the order of rule execution affects rejection outcomes and overall claim accuracy.

INNOVATION SESSION

THE STATION INN



Designing the Future of Patient Engagement (Pt 1)

Presenters: Johnathon Trout, Matt McKean, David Bontrager, & Emma Celek

Join the Unlimited Financials Design team for an interactive session exploring what a comprehensive patient engagement solution could look like within the platform. It's time to sing in harmony! Bring your ideas, share your pain points, and help shape what patient engagement means for the future of Unlimited Financials. Your input will directly influence how this solution is designed and prioritized.

You Will Learn:

- ▶ How to identify touchpoints in your current patient engagement workflow where gaps exist that Unlimited Financials could address.
- ▶ Distill conceptual design directions presented by the Unlimited Financials Design team and provide feedback grounded in your practice's real-world patient communication needs.
- ▶ How to leverage a shared vision for patient engagement by contributing ideas and collaborating with peers and the Design team to shape what gets built next.

Breakout Session 8 | 9:05 AM

SPONSOR SHOWCASE

 CANNERY HALL



AI in Specialty Care: Lessons From the Frontlines

Presenter: Rashie Jain, Co-Founder & CEO, Marvix AI

Specialty consults are long, narrative-dense, and reasoning-intensive. Specialty notes demand technical synthesis, not verbatim transcription of layman language. And no two specialists document the same way. But the harder problem lies beyond the exam room: so much of specialty care depends on pre-charting and note prep, stitching together a longitudinal patient history by pulling scattered data from every corner of the EHR, and on making notes payer-ready, a bar that keeps rising as compliance and documentation guidelines evolve. Drawing on data from tens of thousands of specialty consults, Rashie Jain, CEO & Co-founder of Marvix AI, shares what she's learned building AI for high-acuity, complex care where first-generation AI scribes fall short, and what AI's real mandate is in an ever-changing documentation landscape that demands far more than scribing.

You Will Learn:

- Why specialty documentation is a fundamentally different problem than general clinical scribing and why first-generation AI tools weren't built to handle its complexity.
- What pre-charting and note preparation actually demand in specialty care, from pulling longitudinal patient history across the EHR to meeting an ever-rising bar for payer-ready documentation.
- What the data from tens of thousands of specialty consults reveals about where AI is falling short today and what AI's real mandate should be in high-acuity, complex care environments.

UF FUNDAMENTALS

 THE BLUEBIRD CAFE



Turning Accounts Receivable into Reimbursement

Presenter: Justin Merz

This classroom-style session walks you through AR Management workflows in Unlimited Financials, covering the fundamentals of addressing accounts receivable directly within the platform. You'll learn how to navigate key tools and processes for identifying and resolving outstanding balances efficiently. By the end, you'll have a set list to guide you in converting accounts receivable into reimbursement with confidence.

You Will Learn:

- How to configure AR management workflows in Unlimited Financials to effectively address both denials and aging accounts receivable.
- How to build targeted Charge Assembly searches to track and manage your practice's specific AR needs.



ADVANCED APPLICATION

RCA STUDIO B

**Denial Prevention Through Data-Driven Analysis**

Presenter: Maddie Koufoudakis

Join us for an advanced look at denial analysis into actionable prevention strategies within Unlimited Financials. We'll explore how to move beyond working individual denials and instead use pattern recognition and rule configuration to stop them before they start. This hands-on exploration is built for users who want to transform denial data into a proactive, upstream fix. ***This is a working session, bring your laptop.***

You Will Learn:

- ▶ How to harness denial data within Unlimited Financials and Power BI to identify recurring patterns, root causes, and high-impact denial categories affecting your revenue cycle.
- ▶ How to translate denial trend analysis into targeted workflow adjustments and rule configurations that reduce denial rates before claims are ever submitted.

INNOVATION SESSION

THE STATION INN

**Designing the Future of Patient Engagement (Pt 2)**

Presenters: Johnathon Trout, Matt McKean, David Bontrager, & Emma Celek

Join the Unlimited Financials Design team for an interactive session exploring what a comprehensive patient engagement solution could look like within the platform. It's time to sing in harmony! Bring your ideas, share your pain points, and help shape what patient engagement means for the future of Unlimited Financials. Your input will directly influence how this solution is designed and prioritized.

You Will Learn:

- ▶ How to identify touchpoints in your current patient engagement workflow where gaps exist that Unlimited Financials could address.
- ▶ Distill conceptual design directions presented by the Unlimited Financials Design team and provide feedback grounded in your practice's real-world patient communication needs.
- ▶ How to leverage a shared vision for patient engagement by contributing ideas and collaborating with peers and the Design team to shape what gets built next.

Breakout Session 9 | 9:55 AM

INNOVATION SESSION

 CANNERY HALL



Change Management Fundamentals For Practices

Presenters: Blair Arcaini & Grant Walters

People management at healthcare practices is subject to continuous change — but it doesn't always have to be painful. This session equips practice leaders and supervisors with practical frameworks and strategies for reducing staff resistance, building buy-in, and guiding teams through transitions with confidence. Whether you're navigating a new platform rollout or broader organizational shifts, you'll leave with the tools to make change stick — and earn something closer to a standing ovation than a missed cue.

You Will Learn:

- ▶ Core change management principles and explain how they apply to the unique dynamics of a healthcare practice environment.
- ▶ Key obstacles and stressors that drive staff resistance to change and articulate why they occur.
- ▶ Tangible strategies and approaches you can put to work immediately to manage change more effectively at your practice.

INNOVATION SESSION

 THE BLUEBIRD CAFE



Customer Experience Roundtable

Presenters: Daniela Higgins, Fiona Peoples, & Joe Gockerman

Join your peers for an open dialogue on the customer experience at Unlimited Systems. In this roundtable, we'll share where we're investing in support and what that means for your success, walk through how your NPS feedback is shaping our product roadmap, and highlight the learning and development tools available to help your team get the most out of Unlimited Financials — including what's new in recent releases. Come ready to engage, ask questions, and continue to shape your experience with Unlimited Systems.

You Will Learn:

- ▶ How Unlimited Systems is evolving its support strategy and investing in the customer experience to better support your organization's long-term success.
- ▶ How NPS trends and customer feedback influence product priorities and help shape the future direction of Unlimited Financials.
- ▶ How to leverage the latest learning and development resources, including release updates and UF University, to keep your team informed and growing.

Keynote and Conference Closing:

CENTER STAGE



UF ROADMAP REVIEW | 10:45 AM



CUSTOMER AWARDS & UFINITY CLOSING | 11:35 AM



ADVANCED APPLICATION

RCA STUDIO B

**Advanced Power BI: Driving Better Insights***Presenters: Quinn Dutton & Tyler Quackenbush*

Join us for an advanced, interactive session focused on getting more out of Power BI within Unlimited Financials. Bring your real-world questions and toughest reporting challenges — we'll work through them together and explore how to turn your data into clearer, more actionable insights. This collaborative jam session is designed for users ready to move beyond standard reports and take a more strategic approach to analytics.

You Will Learn:

- ▶ The full catalog of Unlimited Systems-authored Power BI reports and what each is designed to surface.
- ▶ The reports you can employ to have the most impact on your practice's specific operations and revenue cycle priorities.
- ▶ How to select the right report for the job by working through real-world scenarios sourced from your peers.

INNOVATION SESSION



THE STATION INN

**Unlimited AR Roundtable***Presenters: Matt McKean & Johnathon Trout*

Join your bandmates on the AR follow-up tour for a roundtable on the challenges facing your practice. Share what's working (and what isn't), inside Unlimited Financials AR Management Workflow or beyond it, and preview early concepts for Unlimited AR, the next generation of the workflow. Walk away with new connections, practical ideas, and a voice in what comes next.

You Will Learn:

- ▶ How your AR follow-up challenges and processes compare with those of other practices, including common pain points and successful approaches.
- ▶ How other teams are using AR Management Workflow today and where opportunities exist to strengthen the follow-up process.
- ▶ How early concepts for Unlimited AR could support evolving AR needs and address common workflow challenges across practices.

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MARVIX AI



At Marvix AI, we are using generative AI to automate all administrative tasks for clinicians so that they can focus on taking care of the patients. Our application suite is an AI medical assistant for providers that automates all your admin work – Charting, Coding, Triaging, Audits, & Workflows.



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FOR ATTENDING UFINITY 2026

We look forward to seeing you next year!







UFINITY 2026

Nashville, TN | November 1st - 3rd



