



# Evolving Models for Sustainable Medical Practice

## Private Practice Is Possible

*Provided by the Massachusetts Medical Society and its Committee on Sustainability of Private Practice*

### Description

Learn from experienced health care leaders about varying types of independent and private medical practice models (MPMs) that provide high-quality patient-centered medical care.

Accelerated focus on various medical practice models include the following:

- Direct primary care
- Integrative medical-behavioral-complementary practice
- Concierge medicine
- Robust fee-for-service private practice
- Telemedicine

### Special Offer

Join the MMS today for \$100\* including district dues and register for the program at the member price. Save over \$250. Offer valid until February 1, 2020, for first-time members only. Use Promo Code 20PSPPI. Visit [massmed.org/join](http://massmed.org/join).

\*Regular state dues are \$300; district medical society dues range from \$25 to \$300.

**Saturday**  
**February 1, 2020**

**7:30 a.m.–2:00 p.m.**

Massachusetts Medical Society  
Headquarters at Waltham Woods,  
Waltham, Massachusetts

### Learning Objectives

- Learn basic concepts around starting and running a successful private practice
- Identify opportunities to explore new service lines and decrease administrative burdens
- Utilize new models of enhanced patient-physician communication
- Improve patient experiences by improving access and engagement
- Examine roadblocks to starting or joining private practice models of care

Join us as we discuss a variety of financial and regulatory considerations needed to establish a private practice including coordinating, planning, and maintaining an efficient and effective and regulatory compliant office practice. Breakout sessions will include effective tools and keys to success in running these models, as well as managing assets and analyzing profitability and efficiency in areas such as compliance, health care financial management, and construction of office space.

### Accreditation Statement

The Massachusetts Medical Society is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.

### AMA Credit Designation Statement

The Massachusetts Medical Society designates this live activity for a maximum of 4.25 AMA PRA Category 1 Credits™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.



**SPACE IS LIMITED!**

To register for this event or for more information,  
please call (781) 434-7702 or visit [www.massmed.org/evolvingmodelsmedicalpractice](http://www.massmed.org/evolvingmodelsmedicalpractice)

## Program Agenda

7:30 a.m.–2:00 p.m.

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| 7:30–8:00 a.m.        | <b>Networking Breakfast</b>  |
| 8:00–8:05 a.m.        | <b>Welcome and Introductory Remarks</b><br>Christopher Garofalo, MD, FAAFP<br>Chair, MMS Committee on the Sustainability of Private Practice   |
| 8:05–8:45 a.m.        | <b>Federal and State Legislative Update</b><br>Emily Carroll, JD<br>Senior Legislative Attorney, American Medical Association Advocacy Resource Center<br><br>Brendan Abel, JD<br>Director of Advocacy, Government and Community Relations |
| 8:45–9:15 a.m.        | <b>How to Start a New Practice</b><br>Sarah Blake, MD  |
| 9:15–9:45 a.m.        | <b>Collaborative/Integrative Model</b><br>Katherine J. Atkinson, MD, FAAFP   |
| 9:45–10:00 a.m.       | <b>Break</b>   |
| 10:00–10:30 a.m.      | <b>Direct Primary Care Model</b><br>Michelle Parker, MD, FAAFP   |
| 10:30–11:00 a.m.      | <b>Concierge Medicine Model</b><br>Jeffrey S. Puglisi, MD  |
| 11:00–11:30 a.m.      | <b>Telemedicine</b><br>Steven Locke, MD  |
| 11:30 a.m.–12:30 p.m. | <b>Networking Lunch</b>  |
| 12:30–1:55 p.m.       | <b>Breakout Sessions (See Back Page)</b>   |
| 1:55–2:00 p.m.        | <b>Closing Remarks</b><br>Christopher Garofalo, MD   |
| 2:00 p.m.             | <b>Adjournment</b>   |

# Evolving Models for Sustainable Medical Practice: Private Practice Is Possible

## Faculty

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### **Brendan Abel, JD**

Director of Advocacy, Government and Community Relations.

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### **Katherine J. Atkinson, MD, FAAFP**

Board certified in family medicine; founder, Atkinson Family Practice, an integrative medical behavioral practice.

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### **Sarah Blake, MD**

Board certified in pain management and anesthesiology.

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### **Emily Carroll, JD**

Senior legislative attorney, The American Medical Association Advocacy Resource Center, provides legislative and legal support to state and national medical specialty societies on private payer practices and health insurance reforms.

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### **Alain Chaoui, MD, FAAFP**

Board certified in family medicine; president of Congenial Healthcare, LLC, a private practice group formed in January 2018; past president, Massachusetts Medical Society.

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### **Timothy DiBona**

Chief executive officer of Doctors Management Service; president of Salus Resource Group; vice president of the Massachusetts/Rhode Island Medical Group Management Association; treasurer of the Board of Directors for the Greater Lawrence Family Health Center.

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### **Nicholas Ferbert**

AXA Advisors, LLC, financial consultant, coordinated strategies for financial planning, investment management, life insurance, and estate planning.

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### **Christopher Garofalo, MD, FAAFP**

Board certified in family medicine; co-owner, Family Medicine Associates of South Attleboro, PC, a single-specialty private practice; chair, MMS Committee on the Sustainability of Private Practice.

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### **Jeffrey Gold, MD**

Family medicine physician; founder, Gold Direct Care, a direct primary care practice. Member of the Massachusetts Direct Primary Care Coalition.

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### **Judy Grupenhoff, MEd**

Integrative health and wellness coach trained at Duke Integrative Medicine; she also has an MEd in Counseling Psychology and is a HeartMath® Certified Practitioner and Trainer. Judy uses a whole-person, skills-based approach to help individuals improve their physical, mental, and emotional well-being.

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### **Jessica Hawley, CPC**

Billing supervisor and certified professional coder at Atkinson Family Practice. She has over 12 years of experience in health care, billing, and coding.

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### **Hans Jeppesen, MD, MBA, SFHM**

Board certified in internal medicine; president of Charter Health PC; past chief of Hospital Medicine at Cambridge Health Alliance in Cambridge and subsequently at North Shore Medical Center in Salem. He is a senior fellow of hospital medicine with the Society of Hospital Medicine.

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### **Jennifer Jordan, DNP, APRN, FNP-C**

Family nurse practitioner at Atkinson Family Practice. She is faculty at Elms College and clinical faculty at Baypath University. In addition, she serves as a board member on the Doctor of Nursing Practice Advisory Council at Elms College.

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### **Chris Keeley**

Vice president at Bowdoin Construction Corp premier construction management in various areas, including academic/cultural, corporate/lab, medical/health care, residential/hospitality, and retail/restaurant.

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### **Bruce Levine, CPA**

President at Levine, Caufield, Martin & Goldberg PC, specializing in financial management, strategic business planning, and tax advice to closely held businesses, professional service providers, and high-income taxpayers.

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### **Steven Locke, MD**

Board certified psychiatrist who specializes in psychopharmacology, psychosomatic medicine, and integrative psychiatry; chief medical officer at iHope Network; past president of the American Psychosomatic Society.

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### **Michelle Parker, MD, FAAFP**

Board certified in family medicine; founder of Cornerstone Family Medicine; member of the Direct Primary Care (DPC) Alliance; president-elect, Massachusetts Academy of Family Physicians.

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### **Jeffrey S. Puglisi, MD**

Internal medicine; founding partner of Glenville Medical Concierge Care in Greenwich, CT, and has twice been recognized as one of the "Top Doctors in Concierge Medicine." In 2016, he joined the Board of the American College of Private Physicians, established to advance the concierge medicine model.

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### **Jessica Ellis-Wilson, CMPE**

Professional speaker and principal consultant at Massachusetts/Rhode Island MGMA; consultant at Practical Management.

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### **Charles Zanazzi**

Regional vice president; commercial lending and officer, professional services market liaison and north market lead, HarborOne Bank.

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### **Stefan Zelich**

Agent at Carr Healthcare Realty commercial real estate services for health care tenants and buyers.

## Breakout Sessions

12:30–1:55 p.m.

12:30–1:00 p.m.

### How to Start a New Practice: Tools for Success

**LOCATION:** Berkshire Conf. Room

**SPEAKERS:** Sarah Blake, MD  
Hans Jeppesen, MD, MBA,  
SFHM

This session will look at a new physician's experiences, perspective, successes, roadblocks, tips, and effective tools when starting out in private practice.

### Telemedicine

**LOCATION:** Auditorium

**SPEAKER:** Steven Locke, MD

This session will focus on sharing information, resources, and opportunities for telemedicine adoption and implementation.

### Direct Primary Care

**LOCATION:** Percy Wadman Conf. Room

**SPEAKERS:** Michelle Parker, MD  
Jeffery Gold, MD

These two pioneers in DPC will continue to answer questions and provide insights into the DPC model.

DPC is an innovative alternative care model that aims to improve the patient experience by overcoming the administrative burden, fostering personal relationship, and providing easy access, flexible schedules, and price transparency.

1:00–1:30 p.m.

### Collaborative/Integrative Model

**LOCATION:** Berkshire Conf. Room

**SPEAKERS:** Katherine J. Atkinson, MD, FAAFP  
Jennifer Jordan, DNP, APRN, FNP-C  
Judy Grupenhoff, MEd  
Jessica Hawley, CPC

This session will highlight a successful integrated collaborative model for primary care and behavioral health and complementary modalities.

### Group Practice without Walls

**LOCATION:** Auditorium

**SPEAKER:** Alain Choau, MD, FAAFP

This session will deliver a unique model for five independently operated physician groups in which each pod is run and managed as an independent practice.

### Concierge Medicine

**LOCATION:** Percy Wadman Conf. Room

**SPEAKER:** Jeffery Puglisi, MD

This session will provide an overview of an innovative alternative practice model that provides enhanced personalized care and demonstrates 24/7 direct availability to a physician to ensure adequate time and access for each patient.

1:30–1:55 p.m.

### 2020 Independent Practice Survival Guide

**LOCATION:** Berkshire Conf. Room

**SPEAKERS:** Jessica Ellis-Wilson, CMPE  
Timothy DiBona  
Bruce Levine, CPA

This session will share compliance tips and issues related to reimbursement such as new payment models and CMS new proposed rule updates.

### Build Your Dream Practice

**LOCATION:** Auditorium

**SPEAKERS:** Charles Zanazzi, Stefan Zelich  
Chris Keeley

This session will explore issues regarding the physical space for a new practice, adding ancillary services space consideration, and information related to real estate lease renewal negotiation.

Other topics will include market conditions, supply and demand, representation, and tenant's needs.

### Financial Infrastructure for Private Practice

**LOCATION:** Percy Wadman Conf. Room

**SPEAKER:** Nicholas Ferbert

This session will explore a practical financial guide for starting a private practice and key issues to consider including office financial tools, developing a business plan, and understanding key economic indicators.