Medical Director Forum

Essential Education for Physician Advisors and Medical Directors in Case Management

Held in conjunction with the 20th Annual Case Management Conference and 14th Annual ACMA Meeting

Featuring Course Advisor and Program Director – Dr. Trevor Rabie

April 8, 2013
San Diego Convention Center | San Diego, CA
www.acmaweb.org/mdforum
Physicians, are you searching for education specific to you as a physician advisor or medical director in case management? Directors, is your physician advisor new to case management, or in need of education that addresses the unique considerations and challenges associated with his or her role?

ACMA is hosting an intensive workshop designed specifically for physicians aligned with hospital case management. During this full-day event, experienced physician advisors, medical directors and case management leaders will discuss timely topics impacting the unique role of physicians in the case management model. From Medicare regulations to readmissions, speakers will offer insight on timely topics and provide practical applications and tools for attendees to incorporate into their practice.

The ACMA MD forum is being held in conjunction with the 20th Annual Case Management Conference and 14th Annual ACMA Meeting in San Diego, CA.

**IMPORTANT DATES:**
- Hotel Discount Deadline: March 14, 2013
- Regular Registration Deadline: April 1, 2013
- Late Pricing Begins: April 2, 2013
- Conference Date: April 8, 2013

**FORUM SCHEDULE**

**MONDAY | APRIL 8, 2013**

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<th>Time</th>
<th>Session Description</th>
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<tr>
<td>7:30 am – 8:15 am</td>
<td>Breakfast Session: INTRODUCTION TO CASE MANAGEMENT</td>
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<td>8:15 am – 8:30 am</td>
<td>Transition Break</td>
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<td>8:30 am – 8:45 am</td>
<td>Welcome Remarks</td>
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<td>8:45 am – 9:30 am</td>
<td>Session 1: HOW TO REVIEW A CASE: CASE MANAGER &amp; PHYSICIAN ADVISOR PERSPECTIVE</td>
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<td>9:30 am – 9:40 am</td>
<td>Transition Break</td>
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<td>9:40 am – 10:25 am</td>
<td>Session 2: EFFECTIVE COMMUNICATION WITH ATTENDINGS</td>
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<td>10:25 am – 10:45 am</td>
<td>Break</td>
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<td>10:45 am – 11:30 am</td>
<td>Session 3: ESTABLISHING A PHYSICIAN ADVISOR SERVICE: HOME GROWN VS. CONTRACTED SERVICE</td>
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<td>11:30 am – 11:40 am</td>
<td>Transition Break</td>
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<td>12:25 pm – 1:15 pm</td>
<td>Lunch</td>
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<td>1:15 pm – 2:00 pm</td>
<td>Session 5: CASE MANAGEMENT'S ROLE IN SUCCESSFUL TRANSITION PLANNING</td>
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<td>2:00 pm – 2:10 pm</td>
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<td>2:10 pm – 3:55 pm</td>
<td>Session 6 – PART I: KEY FACTORS IN DETERMINING BEDDED STATUS AND LENGTH OF STAY FOR CHF, CHEST PAIN AND COPD</td>
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<td>3:55 pm – 4:05 pm</td>
<td>Transition Break</td>
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<td>4:05 pm – 4:35 pm</td>
<td>Session 7: CASE PRESENTATIONS: DIFFICULT CASES WITH SUCCESSFUL CASE MANAGEMENT INTERVENTIONS</td>
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<td>4:35 pm</td>
<td>Closing / Join Welcome Reception for the ACMA National Conference</td>
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**PRICING CATEGORY**

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<th>MD FORUM MEMBER</th>
<th>MD FORUM MEMBER</th>
<th>MD FORUM &amp; ACMA NATIONAL CONFERENCE MEMBER</th>
<th>MD FORUM &amp; ACMA NATIONAL CONFERENCE MEMBER</th>
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<tr>
<td>REGISTRATION</td>
<td>$675</td>
<td>$900*</td>
<td>$975</td>
<td>$1200*</td>
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<tr>
<td>LATE REGISTRATION</td>
<td>$775</td>
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*Includes 1-year ACMA Membership

**WWW.ACMAWEB.ORG/MDFORUM**
BREKFAST SESSION:

INTRODUCTION TO CASE MANAGEMENT

Trevor Rabie, MD, FCCP
Director of Physician Advisory Services
Memorial Hermann Healthcare System
Houston, TX

SESSION ABSTRACT:
This session is designed for the physician who is new to hospital case management and will provide a basic introduction to its role in health care. Although this is a vast subject, the speaker will provide a summary discussion of key elements of the case management process including: assessment, care coordination, transition planning, resource management, and utilization management. Various models of case management deliver will be explained as well as the traditional roles of the registered nurse case manager, the social work case manager, and the physician advisor. The speaker will also explore the critical relationship of case management to the revenue cycle and financial reimbursement.

LEARNING OBJECTIVES:
1. Describe the concept of hospital case management and its role in health care delivery
2. Discuss the case management process and its essential elements
3. Understand various models of case management within the hospital setting
4. Explain the traditional roles of the registered nurse case manager, the social work case manager, and the physician advisor
5. Describe the role of case management in hospital financial reimbursement

SESSION 1:

HOW TO REVIEW A CASE: CASE MANAGER & PHYSICIAN ADVISOR PERSPECTIVE

Kathy Nipper-Johnson, RN, BSN, CCM
Director of Case Management
Memorial Hermann Memorial City Medical Center
Houston, TX

Trevor Rabie, MD, FCCP
Director of Physician Advisory Services
Memorial Hermann Healthcare System
Houston, TX

SESSION ABSTRACT:
Physician advisors play a critical role in the case management process, relying on case managers to elevate cases appropriately for their input. Whether a patient has failed initial admission screening criteria or an attending declines to discharge a patient who no longer requires acute care, the physician advisor provides valuable perspective based on his or her own medical judgment. In order for the physician advisor to offer an objective evaluation, the case manager must present the case details (both clinical and social) in a succinct, yet methodical, manner. This session will discuss the process of case review both from the case manager and the physician advisor perspective. The speakers will explain the elements of a solid case manager review and methods of objective communication. The expectations of the physician advisor review process will then be discussed as well as actions needed in response to the review determination. Effective communication strategies for the case manager and the physician advisor will also be explored.

LEARNING OBJECTIVES:
1. Identify common situations that are referred to the case management physician advisor
2. Explain the process of a thorough case manager review and the critical elements that need to be communicated to the physician advisor when elevating a case
3. Describe the process of the physician advisor review and how a determination is made
4. Discuss the steps that the physician advisor takes following the determination
5. Understand effective communication strategies in the case manager and physician advisor relationship

SESSION 2:

EFFECTIVE COMMUNICATION WITH ATTENDINGS

Dani Hackner, MD
Medical Director, Case Management
Cedars-Sinai Medical Center
Los Angeles, CA

SESSION ABSTRACT:
One of the crucial elements in the case management process is communication with the attending physician. Topics of discussion most often include admission status, appropriate level of care, care progression issues, resource utilization, and transition planning. Approaching an attending about any of these issues is necessary for effective case management. For a variety of reasons this can often be a difficult task for the case manager. This session will explore common communication barriers that occur between the case manager and the attending. The speaker will discuss effective communication strategies for case managers when approaching attendings, and will provide attendees with instruction on how to coach case managers through these important conversations. Communication and coaching examples will be shared.

LEARNING OBJECTIVES:
1. Recognize the importance of direct communication between the case manager and the attending physician
2. Identify common communication barriers that occur between case managers and attendings
3. Describe communication strategies that are effective for case managers when approaching the attending physician
4. Discuss coaching strategies that can be provided to case managers to assist them in communicating with attendings

SESSION 3:

ESTABLISHING A PHYSICIAN ADVISOR SERVICE: HOME GROWN VS. CONTRACTED SERVICE

Joseph Jordan, MD, MBA
Chief Medical Officer
Intercede Health
Houston, TX

SESSION ABSTRACT:
Hospitals and health systems require a physician advisor to address utilization and case management issues. The complexity of the Centers for Medicare & Medicaid Services’ regulations around level of care and admission status often require a physician’s judgment after the case manager has initially reviewed the case. Patients frequently fail screening criteria and the case manager must consult with the physician advisor to help in determining whether the patient requires observation or inpatient level of care. Physician advisors also assist with resolving barriers to discharge or inappropriate resource utilization as well as provide education to their peers on these issues. There are various models and types of physician advisor services. Some institutions have an internal physician serving in this role while others contract out this service or have a hybrid model of both. This session will discuss the various models of physician advisory services and the pros and cons of each. The speaker will discuss strategies of successful implementation of the various models as well as evaluation processes.

LEARNING OBJECTIVES:
1. Understand the need for the physician advisor in the case management process, particularly from a regulatory aspect
2. Describe the various models of physician advisor programs and the pros and cons of each
3. Explain the required skills and knowledge for a successful internal physician advisor
4. Describe key factors when evaluating the services of an external service
5. Discuss successful implementation strategies for each model as well as processes to evaluate effectiveness
SESSION 4:
THE APPEALS PROCESS: SCREENING CASES FOR APPEAL, FORMULATING WINNING APPEALS, AND PREPARING FOR THE ADMINISTRATIVE LAW JUDGE

Larry Hegland, MD, MMM
Chief Medical Officer
Ministry Saint Clare’s Hospital
Ministry Good Samaritan Health Center
The Diagnostic and Treatment Center
Weston, WI

SESSION ABSTRACT:
Hospitals face multiple types of regulatory and commercial payment audits. Common findings of these audits are for payment errors in both coding and medical necessity (most often related to level of care). This is particularly the case with audits approved by The Centers for Medicare & Medicaid Services (CMS). An important role for the case management physician advisor is to examine these findings and determine whether the hospital appropriately billed for services and disagrees with the audit determination. If the hospital disagrees, there is an appeal process that must be followed. This session will discuss the CMS appeal process. The speaker will explain strategies for writing winning appeals and preparing to take cases to the 3rd level of appeal – the Administrative Law Judge. Participants will learn practical strategies for facilitating successful appeals through the first three levels of the process.

LEARNING OBJECTIVES:
1. Identify common types of CMS audits
2. Explain the first three levels of the CMS appeals process
3. Discuss factors that should be considered when determining whether a case should be appealed
4. Describe components of an effective appeal letter
5. Discuss preparation techniques for presenting at the Administrative Law Judge level

SESSION 5:
CASE MANAGEMENT’S ROLE IN SUCCESSFUL TRANSITION PLANNING

Pamela Foster, APSW, MBA, ACM
Director, Care Coordination
Case Management & Social Services
Mayo Clinic Health System
Eau Claire, WI

SESSION ABSTRACT:
One of the essential functions of the case management process is care coordination which ensures optimal transition planning and prevents readmissions that are costly to both patient and hospital. This session will explore the necessary elements of successful care coordination from a case manager’s perspective and discuss the role that the physician advisor takes in this process. The speaker will discuss one hospital’s experience in successfully reducing readmissions for the heart failure population, and share the tools and resources utilized in their process.

LEARNING OBJECTIVES:
1. Describe the process of care coordination and the roles of the case manager and physician advisor
2. Understand the financial impact of unplanned readmissions
3. Discuss necessary elements of care coordination that successfully prevent unplanned readmissions
4. Identify key processes that are successful with preventing readmissions in the heart failure population

SESSION 6:
KEY FACTORS IN DETERMINING BEDDED STATUS AND LENGTH OF STAY FOR CHF, CHEST PAIN, COPD, PNEUMONIA, ABDOMINAL PAIN, GI BLEED AND DVT (A TWO-PART SESSION)

James Newman, MD
Hospitalist, Department of Hospital Internal Medicine
Assistant Professor of History of Medicine, College of Medicine, Mayo Medical School
Mayo Clinic
Rochester, MN

SESSION ABSTRACT:
CHF, Pneumonia, COPD, Chest Pain, Abdominal Pain, GI Bleed, and DVT are common conditions evaluated and treated in the Emergency Department. When these conditions need more intensive evaluation and/or management than can be provided in the ambulatory setting, patients must be hospitalized. However, not all of these conditions require hospital care and treatment at the inpatient level. This two-part session will review these conditions and the key factors in determining bedded status. The speaker will review evidenced-based clinical tools that will help the physician advisor in making these determinations. Participants will review clinical cases and apply these tools.

LEARNING OBJECTIVES:
1. Review concepts of bedded status options: inpatient, observation, and outpatient in a bed
2. Understand bedded status criteria for the following conditions: CHF, pneumonia, COPD, chest pain, abdominal pain, GI bleed and DVT
3. Identify evidenced-based clinical tools that can assist in determining appropriate bedded status for these conditions
4. Describe specific case examples and decision factors used to determine bedded status

SESSION 7:
CASE PRESENTATIONS: DIFFICULT CASES WITH SUCCESSFUL CASE MANAGEMENT INTERVENTIONS

PANELISTS:
Pamela Foster, APSW, MBA, ACM
Mayo Clinic Health System
Joseph Jordan, MD, MBA
Intercede Health
James Newman, MD
Mayo Clinic
Trevor Rabie, MD, FCCP
Memorial Hermann Healthcare System

SESSION ABSTRACT:
In this final session of the day, participants will have a chance to hear how the principles of case management are applied. A panel of case managers and physician advisors will discuss some of their toughest cases and how they managed them to achieve the best possible outcomes. This will be an interactive session allowing participants to question the panel about the successful application of the case management principles learned throughout the day.

LEARNING OBJECTIVES:
1. Describe complex case examples with successful interventions
2. Understand the application of case management principles using real case examples
3. Discuss the physician advisor’s role in the resolution of the complex patient
All conference sessions will take place at the San Diego Convention Center. With beautiful panoramic views of both the city and the bay, the San Diego Convention Center is a short walk from the Manchester Grand Hyatt. Bus transportation from the host hotel to and from the convention center will be provided during peak commuter times. All ACMA National Conference sessions on April 8-10, 2013, will be conveniently located on the 6th floor of the center, including the Medical Director Forum, which will be held on the 6th floor of the center.

Hotel Accommodations

The Manchester Grand Hyatt San Diego is offering a discounted group room rate of $219 to conference participants. Discounted group rates are applicable during ACMA National Conference dates (April 8-April 11, 2013) until all guest rooms in the room block have been reserved or until the pre-registration deadline of March 11, 2013, whichever comes first.

Hotel reservations can be made directly with the hotel by calling 1-888-957-2484 and mentioning the ACMA National Conference. Reservations can also be made online at [the hotel’s website](http://www.marriott.com).

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