HISTORY OF THE DPC CONFERENCE
Equipping for the Practice Model

INNOVATION - VISION - COURAGE - FAMILY

We are resurrecting Primary Care and Building a Legacy...
DIRECT PRIMARY CARE 2019  
Nuts and Bolts to 2.0

November 14-16, 2019 at the Rosen Centre Hotel in Orlando, Florida. This conference is sponsored by the Docs 4 Patient Care Foundation in conjunction with the Florida Medical Association. It is supported by a generous grant from The Physicians Foundation.

CME STATEMENT  
FMA Accreditation Program

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education through the joint providership of the Florida Medical Association and Docs 4 Patient Care Foundation. The Florida Medical Association is accredited by the ACCME to provide continuing medical education for physicians. The Florida Medical Association designates this live activity for a maximum of 13.00 AMA PRA Category 1 Credits™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

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Direct Primary Care 2019

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The Docs 4 Patient Care Foundation  
1210 North Maple Road  •  Ann Arbor, MI 48103  
www.d4pcfoundation.org  •  (888) 788-5515
Coming online in audio and video

Look for the majority of our 2019 CME panels online within 30 days after the event.

Explore the over 50 hours of DPC training online at:
d4pcfoundation.org/dpc

Don’t fear missing anything.

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Schedule
Thursday, November 14, 2019

4pm - 8pm  Registration Open

6pm - 8pm  Welcome Cocktail Reception
President Lee Gross, M.D. & Secretary Hal Scherz, M.D.

The conference launches with a cocktail reception (2 free drinks each) and expansive hors d’oeuvres to start the event, introduce key players, and begin the networking that will build a physician support team designed to last a lifetime.

continued...

ATTEND THE
DPC MasterClass
(For Free)

Thursday, November 14, 2019

Patient Care

4pm
DPC MasterClass

(For Free)

President Lee Gross, M.D. & Secretary Hal Scherz, M.D.

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Thursday

Equipping DPC Heroes in the Army of Compassion
Schedule
Friday, November 15, 2019

7:00am - 10:00am Registration Open

7:00am - 8:00am Breakfast
*Breakfast Tables by Area of Interest*
Select a table based on your area of interest to share thoughts and experiences in building a DPC practice.

8:00am - 8:20am Introductions and Acknowledgments
*Hal Scherz, M.D. & Lee Gross, M.D.*

8:20am - 8:40am DPC Awards Presentation
*TBA*

Panel #1 - Empowering Physician Leaders  
CME: 1.75 hours

8:40am - 9:00am Understanding How to be the Doctor You Wanted to Be
*Elaina George, M.D.*

9:00am - 9:20am Empowering Physicians to be Change Leaders
*Ellen McKnight, M.D.*

9:20am - 9:40am Engaging Your State to Affect Change
*Med Edison, M.D.*

9:40am - 10:00am Physician Leadership from New President of AAPS
*Kris Held, M.D.*

10:00am - 10:30am Moderated Q&A - Audience Participation
*Moderated by Hal Scherz, M.D.*

continued...
Schedule
Friday, November 15, 2019

10:30am -10:50am  Coffee Break

Panel #2 - Legal

10:50am - 12:05pm  Legal issues, contracting issues, compliance

*Phil Eskew, D.O., J.D., MBA*

Discussion of legal issues, contracting issues, compliance. Update on state and federal legislative / policy issues

Moderated Q&A

*Moderated by Hal Scherz, M.D.*

Lunch Keynote Speaker

12:05pm - 1:30pm  Bernie Marcus

*Founder, Home Depot*

Bernard Marcus is co-founder of The Home Depot, Inc., the world’s largest home improvement retailer. His company revolutionized the home improvement business with its warehouse concept. He served as chairman of the board until his retirement in 2002. He remains director emeritus and Home Depot’s largest single stockholder.

From 1972 to 1978, Marcus was Chairman of the Board and President of Handy Dan Improvement Centers, Inc., a home center retail chain. Prior to Handy Dan, Marcus was President of O’Dell’s, a manufacturing conglomerate, and Vice President of Hard Goods Merchandising for Vornado, Inc., a retail chain.

Marcus’s personal civic involvement has been translated into the creation of The Marcus Foundation where he serves as chairman of the board. His areas of focus include Jewish causes, children, medical research, free enterprise and the community.
Schedule
Friday, November 15, 2019

Panel #3 - DPC working with employers
DPC Solutions for Rural Health Care & Case Study

2:00pm - 3:30pm  Working with self-funded health plans
Carl Schuessler, Jr., DHP, DIA, GBDS

[[Title]]
Lois Hilton

[[Title]]
Lee Gross, M.D.

[[Title]]
Shane Purcell, M.D.

Panel Moderated Q&A

3:30pm - 3:50pm  Coffee Break

Panel #4 - Doctors Lounge Radio Show

3:50pm - 4:50pm  DPC M and M: When everything is right, but still goes wrong
Kevin Wacasey, M.D. - @healthcareonomics
Q&A with Host Michael Koriwchak, M.D.

Wacasey

continued...
5:30pm - 6:00pm  
**BONUS: Leveraging Corporate Partnership to Turnkey Grow Your Patient Panel**  
*Sedera* - Tony Dale  
*aur Health* - Peter J Grimes  
*Liberty HealthShare*

Leverage access to patients with high deductible health insurance policies, health sharing patients open to innovations in medicine, non-insurance networks of patients, and more. Mitigate the risk of the most difficult challenge in making the leap into DPC - building your patient panel.

6:00pm - 7:30pm  
**Dinner Keynote Speaker**  
*John Hunt, M.D.*  
Entrepreneur, Charitable Libertarian, Pediatric Pulmonologist/ Allergist/ Immunologist, Father, and Author.

*Book Signing of Assume the Physician*
Focus on your patients while we focus on you.

When you join the FMA, you get a professional staff dedicated to easing your burdens. The FMA will focus on your needs so that you can focus on patients. Reimbursement help, free and discounted CME, billing and coding assistance, advocacy and access to in-house health care experts are just a few benefits of membership.

Join us so that we can help you practice medicine. Visit www.FLmedical.org or call (800) 762-0233.
Schedule
Saturday, November 16, 2019

7:00am - 8:00am  Breakfast

7:00am - 8:20am  Office Managers breakout breakfast
Moderator: Anne Horner, COO, Epiphany Health DPC
Space limited! Practice managers' networking opportunity to share practical tips and office management pearls. Physicians welcome!

8:00am - 8:20am  Announcements & Recap of Friday Session

Breakout Sessions

TRACK 01
Startup Issues

8:30am - 9:30am  Legal challenges for the startup DPC practice
Luanne Leeds, J.D.
Moderator: Dr. Josh Umbeh
- Discuss basic contracting, pitfalls and precautions.

CME: 1 hour

TRACK 02
Established Practices

9:30am - 9:40am  Break for room change

9:30am - 9:40am  Growth Management for established practices
Drs. Kissi Blackwell, Rob Rosborough
- Discuss growth strategies, pricing & staffing for a growing practice.
- Staying positive, keeping your practice fresh

continued...
### Schedule
**Saturday, November 16, 2019**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Track 01</th>
<th>Track 02</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:40am - 10:40am</td>
<td><strong>Solo-Solo: Thriving in your one doc DPC practice</strong>&lt;br&gt;<strong>Drs. Sharon McCoy George, Phillip Brenner, Dr. Sidney Coupet</strong>&lt;br&gt;• Understanding the one-doc, no staff DPC&lt;br&gt;• Compare solo DPC to the growing “slow food” movement&lt;br&gt;• Explore best practices for solo-solo practice</td>
<td><strong>Managing Expectations and Success in DPC</strong>&lt;br&gt;<strong>Drs. Becky McGilligan, Neal Douglas</strong>&lt;br&gt;• Managing DPC growing pains&lt;br&gt;• Discuss complex patient navigation in DPC&lt;br&gt;• Discuss defining success&lt;br&gt;• Understand how building better relationships is the foundation of DPC</td>
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<tr>
<td>10:40am - 10:50am</td>
<td><strong>Coffee break</strong></td>
<td><strong>Track 01 Continued</strong></td>
<td><strong>Track 02 Continued</strong></td>
</tr>
<tr>
<td>10:50am - 12:05pm</td>
<td><strong>Setting up your practice, determining services and defining value.</strong>&lt;br&gt;<strong>Dr. Staci Benson, Phillip Brenner, Dr. Sidney Coupet</strong>&lt;br&gt;• Determining pricing and services&lt;br&gt;• Balancing practice and family needs&lt;br&gt;• Understand the basics of running your own business&lt;br&gt;• How to grow your DPC with your ideal patients</td>
<td><strong>DPC advanced practice guidance</strong>&lt;br&gt;<strong>Drs. Kimberly Legg Corba, Rebekah Bernard, Nick Tomsen</strong>&lt;br&gt;• Understanding common compliance mistakes / HIPAA&lt;br&gt;• Adding ancillary services to your DPC&lt;br&gt;• Reclaiming full-scope family medicine through DPC&lt;br&gt;• Q&amp;A with seasoned docs</td>
<td></td>
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General Session - Case studies in DPC startups

12:15pm - 1:45pm  Moderated panel discussion  
Moderator: Allison Edwards, M.D.
- Discuss pitfalls and problems that physicians encounter.
- Learn practice pearls
- Explore the role of physician entrepreneurship

CME: 1.5 hours

General Session - Taking Action - The Physicians Path Ahead

1:45 pm - 2:45pm  Taking Action - Most of what we need to fix health care is already here  
Dr. Chad Savage, Dr. Josh Umbehr, Dr. Katarina Lindley, Dr. Kimberly Legg Corba
- Putting together the pieces of a broken system
- Physicians leadership as the solution to health care
- Understanding hurdles and opportunities on the path ahead

CME: 1 hour
Overnight Success

A Decade in the Making

DOCS4
Patient Care
FOUNDATION

“Nuts and Bolts to 2.0” The practice model for why you became a physician.

“Convention Wireless” access code - D4PCF19
Behind the Scenes of Victory: 14 White House Trips, Legal Briefs, Tenacity.

The 10 Year Road to Overnight Success

For 10 years, the physicians of Docs 4 Patient Care Foundation have been preaching, teaching, and writing policy from the front lines of care. June 24, 2019 they became an overnight success.

From a decade of traveling to Washington DC to hold "House Calls on Congress", to working with think tanks, to testifying before state and federal committees - the powers that be have finally started to move.

These unsung heroes of health care have largely travelled to the halls of power on their own dime, undercutting their own practices and families to put in the time needed to persuade.

Most recently, the leadership of Docs 4 Patient Care Foundation and closely associated physicians have travelled to...

- the White House 14 times
- Testified before Senate subcommittees
- made visits to various bureaucracies including the
  - IRS,
  - HHS,
  - Department of Labor
  - Small Business Association

and even hired D.C. attorney firms to create legal briefs explaining the need for health care freedom, the expansion of HSAs, and the protection of Direct Primary Care.

YOUR SUPPORT has borne fruit and is needed to ensure implementation happens. The fight is not over.
Executive Order: The Text Improving Price and Quality Transparency
June 24, 2019 - Signed by President Donald J. Trump

DPC Victory in Section 6(b)

"By the authority vested in me as President by the Constitution and the laws of the United States of America, it is hereby ordered as follows:

Section 1. Purpose. My Administration seeks to enhance the ability of patients to choose the healthcare that is best for them. To make fully informed decisions...

...(b) Within 180 days of the date of this order, the Secretary of the Treasury, to the extent consistent with law, shall propose regulations to treat expenses related to certain types of arrangements, potentially including direct primary care arrangements and healthcare sharing ministries, as eligible medical expenses under section 213(d) of title 26, United States Code."
COMMUNICATIONS VICTORIES – 2019 & PROJECTED WINS – 2020

In the past 12 months, D4PCF earned a voice in the public square for doctors and patients like never before:

OP-EDS

- We engaged Good Comma Editing (GCE)—a team of trained writers, editors, and free-market health care policy experts—to draft, revise, edit, and pitch op-eds by D4PCF in national and state media.
- GCE built and maintains our production calendar, solicits rough drafts from D4PCF Board members, and recruits D4PCF Policy Fellows. View the calendar and draft markups in the following pages.
- 32 op-eds entered our pipeline; 25 op-eds were published in national media under D4PCF bylines; 5 were indefinitely tabled; 1 is currently being pitched to media.
- Our 25 published op-eds had 6 authors.
- Our 9 publishers were Townhall (10), American Thinker (3), The Hill (3), Western Journal (3), Daily Caller (2), Detroit News (1), GeorgiaPol (1), Washington Examiner (1), and Washington Times (1).

SPECIAL PUBLICATIONS

- News Articles—GCE journalists covered our 2018 DPC conference in Orlando, Florida, delivering a batch of evergreen articles quoting conference presenters and attendees. The articles are designed to promote the 2019 DPC conference via D4PCF’s website and email communications.
- Press Releases—We issued 2 press releases. LEVICK wrote and distributed one (edited by GCE) highlighting D4PCF’s influence on President Trump’s executive order on price transparency. GCE wrote and distributed one highlighting D4PCF’s letter to the IRS regarding HSA tax protection for DPC practices.
- Distribution Lists—LEVICK used its distribution channels. GCE began developing a custom media distribution list specifically for D4PCF.
- Official Correspondence—D4PCF engaged Foley Hoag LLP to write a letter to the IRS.

Let’s keep it going! Your funds will enable these wins in 2020:

**D4PCF GOALS FOR GCE**

- 36 to 42 op-eds
- 4 to 6 press releases
- 6 new authors (12 total)
- 14 publishers (national and state)
- Quality assurance & coordination of various D4PCF communications

**D4PCF GOALS FOR GCE OR OTHER VENDORS**

- New website
- Clearer, more professional email campaigns
- Regular online fundraising campaigns
- Targeted distribution lists
- … and many more, contingent on your generous funding of D4PCF’s effective work!
Certificate of Need (CON) laws require medical providers to obtain permission from government agencies before offering new medical services, expanding their existing facilities, or purchasing some new forms of medical equipment.

CON laws were first implemented in the 1960s in an attempt to manage health care costs by decreasing competition among medical providers. Regulators at the time believed that greater control over medical providers would ensure increased access to affordable care in poorer communities.

Yet CON laws have had an opposite effect.

By artificially limiting competition and making it difficult for medical providers to meet the needs of their patients, they have decreased access to quality resources and technologies that providers need to best care for their patients.

Even worse, some state CON regulations allow existing providers to object to new applications. This practice has been used by large corporate hospitals in states like Georgia to prevent competition by smaller private practices.

Although the federal government dropped its own CON requirements in 1986, 36 states and the District of Columbia still maintain CON laws. In recent years, the laws have come under increased scrutiny and are actively being challenged in several states.
Direct primary care (DPC) is an innovative health care delivery model that eliminates unnecessary and expensive middlemen, putting patients in a direct relationship with their primary care physician.

DPC works outside of the traditional insurance-based model by offering patients direct access to their primary care physician at an affordable monthly or quarterly fee.

Studies have shown that DPC practices have successfully increased access and affordability of care while also improving patient outcomes. Unlike other forms of concierge medicine, DPC is an affordable option for individuals and families of all income levels.

Docs 4 Patient Care Foundation president Lee Gross is a recognized expert on direct primary care. He co-founded Epiphany Health in 2002, and added a DPC component to the practice in 2010. Dr. Gross has consulted with legislators in several states on DPC, winning state level legislative victories with his positive policy testimony.
MAINTENANCE OF CERTIFICATION

Repeal Certificate of Need Laws

In order to specialize in a subset of medicine, doctors must complete a process of certification following graduation from medical school. Until recently, the American Board of Medical Specialties, a private certifying board, would administer exams upon completion of a doctor’s specialty training and would certify them in a specialty for life. More recently, however, these certifications have become time-limited and physicians must undergo an onerous, expensive, and time-consuming process known as Maintenance of Certification (MOC), in addition to meeting their state licensure board’s continuing education requirements for Maintenance of Licensure (MOL). For physicians with multiple board certifications this can cost several thousands of dollars per year in time away from their practice, fees, and travel costs to take exams that are often irrelevant to the physician’s actual scope of practice. More importantly, however, MOC has not been shown to improve physician performance or quality.

Physician frustration with MOC has led to the creation of the National Board of Physicians and Surgeons (NBPAS), an alternative certifying board. D4PCF secretary Dr. Hal Scherz is a member of the new board and has been actively involved in getting hospitals and insurance plans to accept NBPS certification.

HEALTH INFORMATION TECHNOLOGY

Free Market Fast

Technological advances have revolutionized medical practice. New medical technologies have been used to eradicate diseases, develop new therapies to treat chronic conditions, and improve the quality of life for people around the world. Technology has also changed the way physicians record and store patient data. Under the HITECH Act and the Affordable Care Act, physicians accepting Medicare patients must convert to electronic health records (EHR) or be reimbursed at a reduced rate. The federally mandated EHRs are expensive to implement, time-consuming to operate, and have not resulted in lower costs, fewer medical errors, increased physician efficiency, or more effective communication between doctors caring for the same patient. Physicians and patients would have been far better off allowing medical practices to develop their own digital record-keeping instead of being subject to a one-size-fits-all federal mandate.

Docs 4 Patient Care Foundation vice president Dr. Mike Koriwchak is an expert on information technology. He was heavily involved in ENT of Georgia’s EHR implementation project, which earned the e-Technology award from the Medical Association of Georgia in 2008, and has been writing about health care technology since 2010.
The Docs 4 Patient Care Foundation (D4PCF) is a 501(c)(3) non-partisan, non-profit organization that promotes free-market health care policy solutions to address America’s increasing health care challenges. Our mission is to preserve the sanctity of the doctor-patient relationship and ensure that health care is of the highest quality, accessible, affordable, and private for all Americans.

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