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COALITION OF STATE RHEUMATOLOGY ORGANIZATIONS

COALITION OF STATE RHEUMATOLOGY ORGANIZATIONS

FELLOWS CONFERENCE FEBRUARY 17, 2018

JW MARRIOTT SAN FRANCISCO UNION SQUARE | SAN FRANCISCO, CALIFORNIA

To access the program materials online, please scan the QR code or visit: csro.info/2018FellowsPdfs



WELCOME MESSAGE



Dear Rheumatologists,

Welcome to the 2018 CSRO Fellows Conference. This program was first introduced in 2005 as a way to provide Fellows information about running a clinical practice and establishing a successful career in rheumatology. In the past year, we have also opened the program to recent graduates needing assistance in preparing their practices.

Our meeting will start with an overview of rheumatology and how we compare among other specialties. We'll cover the nuts and bolts of setting-up a practice, how to hire and fire, negotiate contracts with Insurers, maintain compliance with a plethora of government regulations including MACRA and how to invest and save for retirement. Our goal is to help you gain a comprehensive perspective on all matters concerning management of your practice. We want you to be successful and we believe this meeting will provide you fundamental tools to help make that possible.

The information you can expect to garner from this meeting will be valuable to you in navigating this next phase of your professional careers. Our faculty and other community rheumatologists will be present throughout the meeting to answer questions and help ensure this conference is a success for you.

The CSRO welcomes you and we look forward to being a resource for you throughout your careers in rheumatology.

Sincerely,

Michael P. Stevens, MD, FACR
President, CSRO
www.csro.info



Mission Statement

The Coalition of State Rheumatology Organizations is a group of state or regional professional rheumatology societies formed in order to advocate for excellence in rheumatologic disease care and to insure access to the highest quality care for the management of rheumatologic and musculoskeletal diseases.

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General Session Recording

The general session will be video recorded. Please note that if you ask questions during the session, you may be video and/or audio recorded. Please see the registration/information desk should you have any concerns.

Filming/Photography Statement

No attendee/visitor at the CSRO 2018 Fellows Conference may record, film, tape, photograph, interview or use any other such media during any presentation, display or exhibit without the express, advance approval of the CSRO Executive Director. This policy applies to all CSRO members, non-members, guests and exhibitors, as well as members of the print, online or broadcast media.

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PROGRAM

All sessions will be located in **Metropolitan A** unless otherwise noted. Speakers and times are subject to change.

SATURDAY, FEBRUARY 17, 2018

OVERVIEW

8:00 a.m. - 8:20 a.m. **Breakfast**

12:30 p.m. - 1:15 p.m. **Lunch & Networking**
Location: Gallery

6:00 p.m. - 8:00 p.m. **21st Amendment Brewery
Networking Event**
*Location: 563 2nd Street,
San Francisco, CA 94107
Transportation: Uber or Taxi*

GENERAL SESSION

8:20 a.m. - 8:30 a.m. **Welcome**
Michael P. Stevens, MD, FACR
CSRO President

8:30 a.m. - 9:15 a.m. **State of Rheumatology**
Paul H. Caldron, DO
Arizona Arthritis Rheumatology
Associates
Phoenix, AZ

9:15 a.m. - 10:00 a.m. **So You Want to Go Into
Private Practice**
Herbert S. Baraf, MD, FACP, MACR
Arthritis & Rheumatism Associates
Wheaton, MD

10:00 a.m. - 10:30 a.m. **Why Join a Multispecialty Group?**
Douglas C. Conaway, MD
Carolina Health Specialists
Myrtle Beach, SC

10:30 a.m. - 10:45 a.m. **Break**

10:45 a.m. - 11:30 a.m. **Coding for the Practitioner**
Jean Acevedo, LHRM, CPC, CHC, CENT
Acevedo Consulting Inc.
Delray Beach, FL

11:30 a.m. - 12:00 p.m. **Practice Management**
Ethel Owen, CPC
National Organization of
Rheumatology Managers,
Past President

12:00 p.m. - 12:30 p.m. **Pearls from Early Practice
Experience**
Daniel DeLo, MD
Carolina Arthritis Associates
Wilmington, NC

1:15 p.m. - 2:15 p.m. **Early Career Financial
Management**
James M. Dahle, MD FACEP
The White Coat Investor, LLC
Salt Lake City, UT

2:15 p.m. - 3:00 p.m. **Employment Contracts:
Guidance for Physicians**
Steve McCoy, Esquire
Patient First Corporation
Glen Allen, VA

3:00 p.m. - 3:15 p.m. **Break**

3:15 p.m. - 3:45 p.m. **After the Treatment Decision**
Michael C. Schweitz, MD
CSRO Federal Policy Chair

3:45 p.m. - 4:30 p.m. **Medical Malpractice and Risk
Management**
James S. Haliczzer, Esquire
Haliczzer Pettis & Schwamm
Attorneys At Law
Fort Lauderdale, FL

4:30 p.m. - 4:55 p.m. **Advocacy Participation and the
CSRO**
Sarah Doaty, MD
Alaska Native Tribal Health Consortium
Anchorage, AK

4:55 p.m. - 5:00 p.m. **Closing Remarks**
Michael P. Stevens, MD, FACR
CSRO President

Disclaimer Statement

Statements, opinions and results of studies contained in the program are those of the presenters/authors and do not reflect the policy or position of the Coalition of State Rheumatology Organizations nor does the CSRO provide any warranty as to their accuracy or reliability.

BIOSKETCHES



CSRO PRESIDENT **Michael P. Stevens, MD, FACR**

Michael P. Stevens, MD, FACR graduated from UC Berkeley with a degree in Comparative Literature, french/english. Several years later, he started medical studies in Mexico and went on to complete his medical degree from Boston University School of Medicine. He completed his residency in Internal Medicine at Kaiser San Francisco and his Fellowship in Rheumatology at UCSF. He has been in solo private practice in San Mateo, California, since 1992.

Dr. Stevens became president of the Northern California Rheumatology Society in 2002. He founded the California Rheumatology Alliance in 2004 and led that organization until 2010. He joined the Board of Directors of the CSRO by 2005 and became the third president of the CSRO in 2015.

He is married to a pediatrician and has two boys. Interests include piano, golf and oenology. The latter pursuit has been inspired and continues to be nurtured by learned colleagues, Drs Schweitz and Schimizzi.



Jean Acevedo, LHRM, CPC, CHC, CENTC

Jean Acevedo, LHRM, CPC, CHC, CENTC has over 30 years of health care experience. She has a particular expertise in chart audits, compliance & education relative to physician documentation and coding. Jean has also been an expert witness in civil litigations and an investigative consultant for the DOJ and FBI in Federal fraud cases.

Jean has demonstrated particular expertise in all facets of rheumatology documentation and coding working with small and large rheumatology practices across the country for more than a decade. She has been a speaker at many of the rheumatology physicians' annual meetings including STAR and the Florida Society of Rheumatology. Recognizing physician reimbursement is moving from a pure "fee for service" model to one reimbursing for quality and value, she is helping ACOs and their physicians understand the rules and nuances of diagnosis coding and the impact on Medicare Risk Adjustment (MRA) coding.

She is a workshop presenter for the AAPC, a subject matter expert on Value Based Payments for the AAPC, and co-author of the Academy's Compliance Toolkit. Her article, "Value-based Payment Modifier: Quality vs. Cost", was published in Healthcare Business Monthly, February 1, 2015.

Jean is an instructor at Florida Atlantic University since 2008, where she teaches the regulatory compliance modules of FAU's Certificate in Medical Business Management program, and a member of several Coding Institute Editorial Advisory Boards. Jean has been a Participant in CMS' Medicare Provider Feedback Group, CMS Division of Provider Information Planning and Development since 2007 and is a member of the Jurisdiction 9 MAC's Provider Outreach and Education Advisory Group.

She is a frequently sought after speaker as she possesses the unique perspective of avoiding risk and liability while optimizing reimbursement in the highly regulated health care industry.

BIOSKETCHES



Herbert S. Baraf, MD, FACP, MACR

Dr. Baraf is the managing partner at Arthritis and Rheumatism Associates, the largest private rheumatology practice in the United States with 17 rheumatologists in five locations. He is the founding medical director at The Center for Rheumatology and Bone Research, both in Wheaton, Maryland. In addition, Dr. Baraf holds academic appointments as Clinical Professor of Medicine at George Washington University in Washington, DC, and Associate Clinical Professor at the University of Maryland in Baltimore.

He earned his medical degree from the State University of New York Downstate Medical Center in Brooklyn, New York, and completed his internship and residency at the George Washington University Hospital. Dr. Baraf received further training from a fellowship in rheumatic and genetic diseases at the Duke University Medical Center in Durham, North Carolina.

Dr. Baraf has served on numerous committees of the American College of Rheumatology (ACR), contributing to programming for its annual meeting, helping to develop quality of care measures for rheumatology and, more recently, lobbying Congress for more rational systems of patient care. His efforts were instrumental in the ACR's development of freestanding musculoskeletal ultrasound courses for rheumatologists. He has served as principal investigator on over 300 clinical trials of treatments for gout, rheumatoid arthritis, psoriatic arthritis, Sjögren's syndrome, and other disorders. He also serves on the board of directors of the Sjögren's Syndrome Foundation.

Dr. Baraf has authored numerous manuscripts in peer-reviewed journals such as the Annals of the Rheumatic Diseases, Arthritis Care and Research, Arthritis Research and Therapy, the Journal of Clinical Rheumatology, the Journal of Rheumatology, and The Journal of the American Medical Association. Dr. Baraf has been named a Master of the ACR and in 2014 he was awarded the ACR's Paulding Phelps Award.



Paul H. Caldron, DO

Dr. Caldron received his medical degree at Oklahoma State University, and internal medicine and rheumatology training at the Cleveland Clinic Foundation. In 1994, Dr. Caldron cofounded Arizona Arthritis and Rheumatology Associates, PC. He is fellow in the American College of Physicians and the American College of Rheumatology, and is clinical assistant professor at Midwestern University Arizona College of Osteopathic Medicine. His MBA is from Thunderbird School of Global Management in 2002, and PhD in Governance and Policy Analysis from Maastricht University Graduate School of Governance (UNU-MERIT) in 2016.



Douglas C. Conaway, MD

Dr. Conaway is a rheumatologist currently working in a multi-specialty group in Myrtle Beach, South Carolina. He did his undergraduate studies at Rice University, medical school at Baylor, and internal medicine training at the University of Oregon Hospitals and Clinics. He spent five years in the Air Force as a flight surgeon, and then finished rheumatology training at Temple University School of Medicine. After another 12 years in Philadelphia on the faculty at Temple, he moved to his current position in private practice.

For a number of years, he gave the rheumatology section of the Internal Medicine Board Review at the ACP national meeting, and he is currently active in the RApopMed group, a national group of rheumatologists trying to make the practice of rheumatology more efficient by incorporating new clinical modalities such as biomarkers and ultrasound and systems tools such as population management.

BIOSKETCHES



James M. Dahle, MD FACEP

After growing up in Alaska, Dr. Dahle did his undergraduate work and played on the hockey team at Brigham Young University before attending medical school at the University of Utah. He then completed an emergency medicine residency at the University of Arizona, finishing in 2006. He subsequently spent four years on active duty working in Air Force and Navy hospitals on four continents before joining a small democratic emergency medicine group in suburban Utah in 2010. In residency, he became interested in personal finance and investing after feeling ripped off by financial professionals, and began a long process of educating himself and others about these important topics. In 2011, he started The White Coat Investor, the most widely read, physician-specific personal finance and investing website in the world, which is visited by over 117,000 unique individuals each month. In 2014 he published his first book, *The White Coat Investor: A Doctor's Guide to Personal Finance and Investing*, and it has remained an Amazon best-seller since publication.



Daniel DeLo, MD

Dr. DeLo is a newly established member of the private practice group Carolina Arthritis Associates in Wilmington, NC. Prior to this, he served for about 8 years as a rheumatology attending and clinical assistant professor of medicine at the University of Pittsburgh Medical Center in Pittsburgh, PA. He had also completed rheumatology fellowship at the University of Pittsburgh Medical Center. He completed residency at East Carolina University in Greenville, NC and spent the first year of residency at the University of South Carolina in Columbia, SC. He was born and raised in Morgantown, WV where he attended college and medical school.



Sarah Doaty, MD

Dr. Doaty is a full-time rheumatologist at the Alaska Native Medical Center in Anchorage, AK. Dr. Doaty completed a rheumatology fellowship at UCLA, during which time she served on the ACR's Fellows-in-Training Subcommittee and Government Affairs Committee. She served as the first co-director of the ACR's Advocacy 101 program, a health policy training session in Washington DC for rheumatology fellows and program directors, which launched in 2015. She sits on the Board of Directors for the Coalition of State Rheumatology Organizations (CSRO).

Dr. Doaty received a B.S. in Biology from The American University in Washington, DC. She attended medical school and completed a residency in Internal Medical/Primary Care at the George Washington University. Her interests include access to specialty care among rural patient populations and rheumatology fellow engagement in health policy and patient advocacy.

BIOSKETCHES



James S. Haliczzer, Esquire

James S. Haliczzer, co-founder and the firm's managing partner, has been involved in dozens of trials involving numerous substantive areas of the law including medical and legal malpractice, personal injury, wrongful death, commercial and construction litigation. He concentrates his practice at this time in the trial of complex cases involving medical malpractice, personal injury/wrongful death, and business disputes. Mr. Haliczzer has the unique experience of having successfully represented both defendants and plaintiffs. He has lectured throughout the country on issues as varied as legal and medical malpractice, general insurance law and risk management/quality assurance programs.

Mr. Haliczzer has been recognized by numerous organizations for his skills as a trial lawyer. In addition to being listed in Best Lawyers in America® since 2010, Mr. Haliczzer was named as the 2015 Miami "Lawyer of the Year" in Medical Malpractice Law by Best Lawyers in America®. Only a single lawyer in each practice area and designated metropolitan area is honored as the "Lawyer of the Year," making this accolade particularly significant. He holds an AV Preeminent rating from Martindale-Hubbell's Peer Review Ratings service, the highest possible rating indicating excellence in the practice of law and the highest ethical standards. He has been listed in Florida Trend Magazine's Florida Legal Elite featuring the top 1.6% of lawyers in the State of Florida as voted by his peers, Florida Super Lawyers, and the South Florida Legal Guide "Top Lawyers" for nine consecutive years.

Mr. Haliczzer has been involved in numerous professional and community activities. He has served as a member of the Broward, Florida, American, and Federal Bar Associations, participating in such areas as professional ethics, attorney misconduct, and the unauthorized practice of law; the American Academy of Healthcare Attorneys; and the Florida Bar Committees on Ethics and Professionalism. He also served on the Board of the Broward County Boys and Girls Clubs, The Board of Trustees of St. Mark's Episcopal School, the Broward County Red Cross and chaired both the local Florida Bar Grievance and UPL Committees. Mr. Haliczzer is a member of the American Board of Trial Advocacy.

Mr. Haliczzer is a graduate of the University of South Florida where he took both a Bachelor's degree in 1976 and a Master's degree in 1978. He was a member of various honor societies including Omicron Delta Kappa, Phi Kappa Phi and Sigma Tau Delta. He graduated from the Stetson University College of Law in 1982 where he was voted the "Best Advocate," in his graduating class, was the Associate Editor of the Stetson Law Review and published, Note, "An Employer's Liability for the Acts of his Servant, Mercury Motors Express V. Smith in 1982". Mr. Haliczzer is admitted to The Florida Bar (1982). He is admitted to practice in Florida, Colorado, and U.S. District Court, Southern District of Florida, and the U.S. Court of Appeals, Eleventh Circuit. He resides in Fort Lauderdale, Florida with his wife since 1987. They have one son, a writer in New Orleans.



Steve McCoy, Esquire

Mr. McCoy graduated from the University of Virginia School of Law in 1997. He spent 11 years in private practice as a partner in the health law section of Williams Mullen, in Richmond, Virginia, where he represented physicians, hospitals and other health care providers. He left Williams Mullen to serve as general counsel to Patient First Corporation, a provider of primary and urgent care services that employs over 500 physicians and extenders at 70 locations in Virginia, Maryland, Pennsylvania and New Jersey, and treats patients during more than 2.5 million visits annually. Mr. McCoy is the past chair of the Health Law Section of the Virginia State Bar and is currently a member of the Board of Governors of the Virginia Bar Association's Health Law Council.

BIOSKETCHES



Ethel Owen, CPC

Ethel Owen is the practice administrator for Arthritis & Rheumatology Associates of Palm Beach, a seven physician rheumatology practice in South Florida. She has been in her present role since 2006. Her responsibilities include managing employees, overseeing all billing, infusion, reimbursement and practice operations. Ethel has been working in the medical community for more than 30 years.

Ethel has been a Certified Professional Coder and a member of the American Academy of Professional Coders since 1997. Her coding responsibilities have included surgical, E & M coding and chart documentation training for physicians and support staff. Ethel is on the Editorial Board of Rheumatology Practice Management.

Ethel has been a member of the National Organization of Rheumatology Managers, (NORM), since 2006. She has served as a board member since 2007. Her duties included recruiting new members, helping to plan conferences and obtaining event sponsorship. Ethel is the Past President of NORM.



Michael C. Schweitz, MD

Dr. Schweitz completed a seven year undergraduate and medical school program at the George Washington University in Washington, DC, in 1972. He completed his internal medicine training at GW and his rheumatology fellowship at Georgetown University in 1977. He then entered private practice in West Palm Beach, Florida.

Dr. Schweitz is a partner in Arthritis and Rheumatology Associates of Palm Beach, a seven physician single specialty practice in Palm Beach County. He is a Fellow of the American College of Physicians and Master of the American College of Rheumatology. He served as a member of the Committee on Rheumatologic Care. He is a past president of CSRO and the Florida Society of Rheumatology where he continues to sit on both executive committees.

He has served on the Board of Directors of the Arthritis Foundation at both state and local levels for many years and for the past 40 years has donated his time in helping to staff a free arthritis clinic for medically indigent patients in Palm Beach County.

Dr. Schweitz has been recognized in “Best Doctors of South Florida” and “America’s Top Physicians.” His personal interests include wine collecting and wine education, as well as collecting first edition crime fiction.

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SEPTEMBER 14 - 15, 2018

ROSEMONT, IL

A photograph of a city skyline at dusk, with tall buildings and a river in the foreground. The text 'SAVE THE DATE' is overlaid in large, white, sans-serif letters.

SAVE THE DATE

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