

About the Symposium

This two-day strategy symposium gathers strategy and business development leaders from the clinical and business sides of healthcare who are involved in walk-in medicine. The focus of the conference is on convenient care (retail clinics), urgent care, work-site care and primary care. We identify convergence between these modes of care and harness the best ideas for a 10-year strategy. The overall purpose: increase patient access and convenience, lower costs, improve quality and contribute financially to each participant's respective organization. The meeting is highly interactive, using a combination of case studies and discussion panels. The number of participants is limited to promote that interactivity.

Why You Should Attend

The ground is shifting in the worlds of walk-in and primary care medicine, and in some geographic markets it is shifting quickly. No longer can urgent care and retail clinics be viewed through the narrow lens of acute care. Primary care is creeping into the service mix because of provider shortages and closed patient panels. Health systems know they need to grow in order to survive, but their primary care practices appear to be stuck. Some health systems have introduced urgent care centers or retail clinics, while others are partnering with national retail clinic operators or doing joint ventures with national urgent care networks.

At the same time, private and government payers are looking to take large-scale cost out of the healthcare system, and many new players are getting into the act. CVS, United Healthcare and American Well are examples of new players providing care directly to patients. On one hand, they are entering complex and unfamiliar territory. On the other hand, they are not hindered by entrenched behaviors, legacy computer systems and outdated business practices. Whatever you call it -- carve out medicine, accountable care, population management -- these large entities see convenient care, urgent care and worksite care as part of the delivery mix.

Four themes will guide the symposium agenda:

- Convenience and timeliness at the top of the list for patients assessing their walk-in experience
- Population health management as the new economic paradigm vs. fee for service
- Employers at the center of healthcare provider strategies
- Primary care provider shortages forcing new approaches to care

What is ConvUrgentCare® ?

ConvUrgentCare is the convergence of tactics between convenient care (retail clinics), urgent care, worksite care and primary care.

Sponsors

We wish to thank this year's Platinum Sponsor, Bayer Diabetes, and Gold Sponsors, Quidel Corporation and the Kot Diet System. For sponsorship information, contact us at info@merchantmedicine.com or call us at (651) 483-0450.



Hilton Orlando

Meeting Details

The conference begins at 1 p.m. on Monday, January 23, with an afternoon session on prevention and chronic disease management services followed by a welcome reception. The meeting adjourns at noon on Wednesday, January 25, so you will be able to fly out that day. Register for the symposium online at <http://merchantmedicine.com/seminars.cfm> or by

calling Merchant Medicine at (651) 483-0450.



Hilton Orlando

Session on Chronic Disease Management Services with a Focus on Local Care Models

Prevention and chronic disease management services are beginning to show up in many walk-in settings. Services include screenings and monitoring services around diabetes, hypertension, asthma, and obesity. And partnerships between different types of entities abound. This session will feature the following speakers:

- Stewart Levy, RPh, president and founder of Health Promotion Solutions, who is well

recognized by corporate wellness organizations and retail clinic operators;

- Robin Foust, PAHM, CEO of Zoe Consulting, who works with hospital systems and provider organizations to implement care management programs, including resources to help employers with cost containment ;
- Nancy Gagliano, MD, chief medical officer at MinuteClinic, who is spearheading disease management pilots through health system pilot projects;
- Rick Gantt, VP at national health insurance broker Benefit Controls Inc., who has implemented worksite clinics for his clients.

Meeting Registration

The meeting registration fee is \$899, which includes all sessions, a welcome reception the evening of Monday, January 23, breakfast, lunch and dinner on Tuesday, January 24, as well as breakfast on Wednesday, January 25. Register for the symposium online at merchantmedicine.com or by calling Merchant Medicine at (651) 483-0450. Space is limited and the symposium has sold out each year, so please register early.

Refund Policy

Refunds (less any credit card fees) will be granted through December 31, at which time Merchant Medicine must commit to final attendee numbers with the hotel. We regret that we cannot grant any refunds after December 31.

2011 Hotel and Setting

The Symposium will take place January 23-25, 2012, at the Hilton Orlando, about 15 minutes from the Orlando International Airport, right next to the Orange County Convention Center. Guest rooms are not included in the registration fee. You can book your hotel room directly with the Orlando Hilton by calling (888) 488-3509. The room rate is \$220 plus tax for single or double occupancy. Please mention Merchant Medicine's ConvUrgentCare Strategy Symposium when making your reservation. You can also book directly by going to the [ConvUrgentCare Strategy Symposium reservation site](#).

Transportation

The Orlando International Airport is about 13 miles from the Hilton Orlando and takes only 15 minutes. Mears Transportation serves the Hilton Orlando from the Orlando airport and costs \$19 each way or \$30 round trip. Registered attendees will receive a \$3 discount coupon off the \$30 round-trip price. To make a reservation, call Mears at (407) 423-5566 or [book online directly with Mears Transportation](#). Taxi service from the airport to the Hilton Orlando costs around \$35 each way.

Disney Tickets

If you would like to extend your stay, Disney will provide after 2pm and after 4pm tickets to our attendees. These are not available at the Park Ticket Windows. They also offer pre-arrival savings on the multi-day tickets which include a bonus visit to one of five non-park Disney venues. For details and advance purchase, call 407-566-5600.



Walt Disney World®



Speakers

Reginald Allouche, MD, is the founder and vice chairman of Ceprodi SA, a French diet system company with a method and line of products under the Kot brand. Dr. Allouche, a diabetes specialist and researcher who was the executive vice president of the largest state-owned French hospital, founded Ceprodi in 1998 to help give his diabetic patients more pleasure and reward to go along with traditional healthy foods. Dr. Allouche has also been executive vice president of GLAXO France and a researcher at INSERM, a large public medical research institute in Paris. Today he sees patients at the Centre de L'Homme in Paris, a clinic for men over age 50. He has published major works on diabetes, insulin control and nutrition in hospitals. He has also published two books: "La Revolution Minceur" (The Thinness Revolution), based on his groundbreaking research on insulin, adiponectin, resistin, ghrelin and leptin hormones; and "Mincir a Satiete" (Thinness through Satiety), based on research around the relationship between the brain, intestinal flora, metabolism and food effects.

David Bensema, MD, Baptist Health System, Lexington, KY – David is medical director and general manager of the Baptist Health retail clinic initiative, which to date includes more than a dozen Walmart locations. David will facilitate a panel discussion with other hospital system operators of retail clinics. The panel will discuss the results of Merchant Medicine's benchmark survey of all hospital-based retail clinic operators on their operating performance. The panel will try to isolate areas where these clinics are making positive contributions, as well as areas where they need to improve if they are to survive an era of intense focus on cost savings.

Jennifer Ford, Senior Associate Editor, ADVANCE for NPs & PAs, Philadelphia – Jennifer will present research that was conducted jointly between ADVANCE and Merchant Medicine on attitudes by nurse practitioners and physician assistants about working in retail clinics. The purpose of the research was to identify possible recruitment challenges and opportunities on the horizon for operators of retail and urgent care clinics, given the growing role of non-physician providers in the "patient-centered medical home."

Robin Foust, PAHM, is an award-winning health scientist who has developed successful health management programs for hospital systems, employers and government entities throughout the United States. She will talk about care management programs in a world that is moving rapidly toward a risk-based revenue model, and dig into the details of how a health system should implement a care management program, including some of the tools that must be in place prior to approaching employers and insurance companies. Foust is best known for developing an application called "myCatalyst" that is changing how healthcare management is coordinated and evaluated. She has received two C. Everett Koop Awards and numerous leadership awards for her work in wellness. Robin's latest publication is *Engagement Strategies in Health & Disease Management: Best Practice in Boosting Participation*.

Nancy J. Gagliano, MD, is chief medical officer at MinuteClinic. She will discuss MinuteClinic's role in chronic disease management during the Monday afternoon session, as well as co-present with Tod Podl, MD, during the case study on the Cleveland Clinic/MinuteClinic partnership on Tuesday. She is responsible for the overall delivery of clinical care to MinuteClinic patients, the provision of appropriate physician supervision to nurse practitioners in collaborative practice, and the establishment and maintenance of relationships with the external physician community. Gagliano has more than twenty years of experience in ambulatory care operations, including quality, administration, compliance, and finance. Most recently, she was senior vice

president of practice improvement for Massachusetts General Hospital and Massachusetts General Physicians Organization in Boston. Gagliano also has experience as a medical and clinical director of Massachusetts General primary care and women's health ambulatory operations. Gagliano is a graduate of Harvard Medical School, where she currently serves as an Assistant Professor.

Rick Gantt, is vice president of Benefit Controls of SC, Inc., one of the 20 largest employee benefits consulting firms in the nation. He will speak on Monday afternoon about why disease management matters to employers. In fact, incorporating employee clinics and associated disease management programs is an important focus of his company. Rick is also the president of Team Believe Achieve, an award-winning wellness consulting company dedicated to helping employers improve the quality of life of plan participants, creating less corporate liability and higher work efficiency. Rick's passion is to help companies reach healthcare independence and 13 of his clients are in the "Flat Liner Club," a designation that means they are defying the upward trend lines in health costs. Rick uses value-based benefits, managed wellness programs, and high performing networks to improve the quality of life in participants.

Brian R. Klepper, PhD, is a health care analyst, industry advisor and commentator. He is a principal of Healthcare Performance Inc., a consulting practice based in Atlantic Beach, FL, and chief development officer for WeCare TLC, a worksite primary care clinic and medical management firm based in Longwood, FL. He will focus on the excess utilization and cost of healthcare from the employer perspective, particularly self-insured employers, and their influence on an evolving revolt. He will cover what is driving the growth in worksite care and how employers evaluate potential partners. He will also talk about the incentives inherent in any payment methodology, and how that has played out in a fee-for-service world. As with other speakers at the symposium, Brian will talk about the complex task of trying to transition away from the prevailing payment paradigm to managing risk, all while the motor's running. Brian is editor of Care & Cost, and is a regular contributor to the Health Affairs Blog and Kaiser Health News. He has provided health care commentary to CBS Evening News, the Wall Street Journal, the New York Times, and the Washington Post. He has published articles on Medscape and Healthleaders, and in The New England Journal of Medicine, Modern Healthcare, and Business Insurance.

Pete Knox, Executive Vice President, Bellin Health – Bellin Health is the largest health system in Green Bay, WI, and Pete Knox is helping lead them through a rapid and aggressive transition from the traditional procedure-based model to a risk-based model. Bellin was one of the earliest health system entrants into the retail clinic industry, not only opening its own clinics, but consulting with dozens of other health systems in opening clinics inside retail stores. Bellin is perhaps one of the best examples in a midsize U.S. market of a health system that is working with large employers, insurance companies, government and the entire citizenry of Green Bay to improve the health of the community and reduce cost, while at the same time sharing in the risk. Pete calls it simply "population management," and believes walk-in clinics are an important part of moving toward a successful population management strategy.

Stewart Levy, RPh, is the founder and President of Health Promotion Solutions, a firm that provides evidence-based solutions to support chronic disease prevention, health education and care management to employers, insurance companies, health systems, retailers, consumer groups, government agencies and other businesses. Stewart will present various strategies and resources for walk-in clinics to support area employers with their chronic disease management programs. Included in the discussion will be biometric testing, validated assessment tools, incentive programs, health coaching and staff certification for a collaborative team approach. One focus of Levy's work is supporting employers with hard-to-reach populations, such as the transportation industry, with medical and chronic disease services. His company has initiated relationship with the Convenient Care Association and various trucking organizations to provide care management to truckers throughout the United States.

Stewart's 25-year healthcare career includes senior level sales and marketing positions in the pharmaceutical industry including Novo Nordisk and Merck and senior VP of business development with Impact Health, a national health promotion organization.

Jason North, Executive Director, After Hours Pediatrics – Pediatrics is one of the most complicated factors affecting walk-in medicine, both clinically and politically. When retail clinics first emerged, the pediatric community was the first to rebel, creating difficult public relations issues for large health systems. Although the furor has died down significantly, any hospital system looking at retail or urgent care clinics must take pains to involve their pediatric providers in developing a walk-in clinic strategy. Jason will speak about what specifically that "involvement" means, including some examples of what worked and didn't work in establishing new centers.

Kevin Palattao, VP Care Systems, Health Partners, Minneapolis – Health Partners, a Minneapolis-based health system and health insurer, has entered the telemedicine space with a service called Virtuwell. The service has been live for about one year and involves a unique combination of computer algorithms, live nurse practitioners and a very intuitive user interface for patients. The limited scope of services is similar to that of a retail clinic. Kevin will talk about how Virtuwell came to be and where he sees telemedicine for minor episodic illnesses going in the developing ACO world.

Tod Podl, MD, MS, Section Head/Family Medicine, The Cleveland Clinic, Beachwood, OH – Tod is the medical director involved with The Cleveland Clinic's partnership with MinuteClinic. Thus far, the partnership has involved a relatively simple model whereby The Cleveland Clinic provides collaborative physicians to MinuteClinic, and MinuteClinic provides branding and preferential referrals back to The Cleveland Clinic. But there has been ongoing talk of the MinuteClinic hospital partnerships growing into areas like chronic disease management and further primary care involvement. Tod will be joined by Nancy Gagliano, MD, CMO at MinuteClinic, and together they will address the status of that partnership in Cleveland and South Florida, and the realities of what is and is not possible in such a relationship.

Jane Sarasohn-Kahn, MA, MHSA, THINK-Health and Health Populi Blog -- Jane just finished writing a major report for the California Healthcare Foundation on the subject of primary care delivery in alternative settings, including retail clinics. She will help us understand the big picture, and drill down and talk about retail clinics and urgent care in the context of primary care integration with medical homes and accountable care communities. Jane is a health economist and management consultant who has worked with a broad range of health care stakeholders in the U.S. and Europe for more than 20 years.

Scott A. Shipman, M.D., M.P.H., is the Director of Primary Care Affairs and Workforce Analysis at the Association of American Medical Colleges (AAMC). He is also an assistant professor at the Center for Health Policy Research, The Dartmouth Institute for Health Policy and Clinical Practice, Dartmouth Medical School. He is a pediatrician by training. One very obvious piece of what's driving walk-in medicine today and in the future is the primary care physician shortage in the United States, a labor issue that is creating ripples both up and down the food chain. Scott is one of the leading researchers on the primary care workforce in the United States, and he has also followed the retail clinic space almost since its inception. His primary focus is on the physician and non-physician clinician workforce at the intersection of medical education and the healthcare delivery system. Scott also studies the policies that affect children's access and quality of care. And since children generally represent at least one third of the patient volume in retail and urgent care clinics, his insight is extremely timely.

ConvUrgentCare Strategy Symposium Agenda

Monday, January 23rd

Prevention and Chronic Disease Management Services in a Walk-in World

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| 1:00 – 1:05 pm | Welcome and Introductions
Tom Charland, Merchant Medicine |
| 1:05 – 1:55 pm | Evidence-Based Solutions for Chronic Disease Prevention and Management
Stewart Levy, RPh, Health Promotion Solutions |
| 1:55 – 2:55 pm | Disease Management at Retail Clinics
Nancy Gagliano, MD, MinuteClinic
Jim Murray, MinuteClinic |
| 2:55 - 3:05 pm | <i>Break</i> |
| 3:05 – 3:55 pm | Care Management Opportunities for Health Systems
With Payers and Employers
Robin Foust, Health Management Consultant |
| 3:55 – 4:45 pm | Why Disease Management Matters to Employers
Rick Gantt, Benefit Controls |
| 4:45 – 5:30 pm | Panel Discussion and Questions |
| 6:45 – 8:30 pm | <i>Welcome Reception</i>
<i>Remarks by Reginald Allouche, MD, Ceprodi SA, Paris</i> |



Tuesday, January 24th

A New Paradigm for Walk-in Medicine

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| 7:00 – 8:00 am | <i>Continental Breakfast</i> |
| 8:00 – 8:10 am | Welcome and Announcements
Tom Charland, Merchant Medicine |
| 8:10 – 9:25 am | Excess Utilization and the Employer Revolt
Brian R. Klepper, PhD, Healthcare Performance Inc. |
| 9:25 – 9:35 am | <i>Break</i> |
| 9:35 – 10:55 am | How the primary care provider shortage continues to fuel new modes of care
Scott Shipman, MD, MPH, Dartmouth Institute for Health Policy and Clinical Practice |
| 10:55 – 11:00 am | <i>Short Break</i> |

- 11:00 am – 12:15 pm** **Case Study: Bellin Health’s Response to the ACO Challenge and How Walk-in Medicine Plays a Role**
Pete Knox, Bellin Health
- 12:15 – 1:00 pm** *Break/Deli Express Lunch*
- 1:05 – 2:20 pm** **Case Study: Health Partners’ Virtuwell Limited-Scope Care using Nurse Practitioners and the Web**
Kevin Palattao, Health Partners
- 2:25 – 3:45 pm** **Case Study: The MinuteClinic/Cleveland Clinic Partnership**
Tod Podl, MD, MS, The Cleveland Clinic
Nancy Gagliano, MD, MinuteClinic
- 3:45 – 4:00 pm** *Break*
- 4:00 – 5:30 pm** **Panel Discussion: Hospital System Operators of Retail Clinics**
David Bensema, M.D., Baptist Express Care, 16 Walmart locations
Ken Berndt, Bellin Health, 34 retail clinics in partnership with multiple hospital systems in multiple retail venues
Edward Epperson, Carson Tahoe Clinic at Walmart, 2 Walmart Locations
Patrick Charland, MD,MBA, Health Development Consulting, LLC
- 7:00 pm** **Outdoor Reception and Dinner (weather permitting)**

Wednesday, January 25th

A New Paradigm for Walk-in Medicine

- 7:00 – 8:00 am** *Continental Breakfast*
- 8:00 – 9:15 am** **Primary Care Everywhere?**
Jane Sarasohn-Kahn, MA, MHSA, Think Health\
- 9:15 – 10:30 am** **Avoiding Pitfalls in Pediatric Walk-in Medicine**
Jason North, Executive Director, After Hours Pediatrics
- 10:30 – 10:45 am** *Break*
- 10:45 - 11:45 am** **PA and NP Attitudes toward Retail Clinics**
Jennifer Ford, Senior Associate Editor, ADVANCE for NPs & PAs
- 11:45 am - 12:15 pm** Final Audience Discussion/Questions/Wrap up/Adjournment