

# THE SEVENTH NATIONAL Medical Home Summit

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**March 23 – 25, 2015**  
**Philadelphia**

Loews  
Philadelphia  
Hotel



[www.MedicalHomeSummit.com](http://www.MedicalHomeSummit.com)

A Leading Forum on Developing  
and Implementing Patient- and  
Family-Centered Medical Homes

Co-located with the Fifteenth  
Population Health Colloquium

## SUMMIT CO CHAIRS:



**John Iglehart,**  
*Founding Editor, Health Affairs; National Correspondent, New England Journal of Medicine*



**David B. Nash, MD, MBA, FACP,** *Dean, Jefferson School of Population Health, Thomas Jefferson University*



**Marci Nielsen, PhD, MPH,** *Chief Executive Officer, Patient-Centered Primary Care Collaborative*

## MINI SUMMIT CHAIRS:



**William K. Applegate, PhD,** *Chief Executive Officer, Iowa Chronic Care Consortium*



**Lisa M. Letourneau, MD, MPH,** *Executive Director, Maine Quality Counts*



**Julie Schilz, BSN, MBA,** *Director, Care Delivery Transformation, WellPoint*

## PRECONFERENCE CHAIRS:



**Patrice V. Sminkey, RN,** *Chief Executive Officer, The Commission for Case Manager Certification (CCMC)*



**James (Larry) Holly, MD,** *Chief Executive Officer, Southeast Texas Medical Associates (SETMA); Faculty member, School of Medicine, University of Texas Health Science Center San Antonio and Texas A&M Health Science Center*

## KEYNOTE SPEAKERS:



**Jeff Arnold,** *Chairman and Chief Executive Officer, Sharecare*



**Stephen K. Klasko, MD, MBA,** *President and Chief Executive Officer, Thomas Jefferson University and TJUH System*



**Kavita Patel, MD,** *Managing Director for Clinical Transformation and Delivery, Engelberg Center for Healthcare Reform, The Brookings Institution; Former Director of Policy, The White House*



**Rushika Fernandopulle, MD, MPP,** *Founder and Chief Executive Officer, Iora Health*



**Farzad Mostashari, MD, MSc,** *Chief Executive Officer, Aledade; Former HHS National Coordinator of Health Information Technology*

## CO-HOSTED BY:

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**TUITION SCHOLARSHIP PROGRAM:** The Summit is pleased to offer full and partial tuition scholarships to qualifying representatives of local, state and federal government, consumer advocate organizations, safety net providers, academics, students, and health services research organizations. Consult the web site for details.

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In February 2007 the American Academy of Family Physicians (AAFP), the American Academy of Pediatrics (AAP), the American College of Physicians (ACP), and the American Osteopathic Association (AOA) published their landmark Joint Principles on the Patient-Centered Medical Home (PCMH). This approach promises comprehensive primary care for children, youth, and adults in a partnership between individual patients and a team of health care professionals at the practice level. The team coordinates care across all elements of the health care system. Increased quality, patient safety, use of technology, performance incentives, accountability, and patient-centeredness are all hallmarks of the medical home model.

By 2010 the medical home model had become one of the most talked-about concepts in health care and the rising star of health care reform and its newest concept, the Accountable Care Organization or ACO. The model was also evolving, with different iterations in the make-up of the medical home team, the way in which care coordination is managed, and the relationship with other members of the “medical neighborhood” — behavioral health, oral health, social services, and specialty and inpatient care. Even the name was evolving, with “health homes” and “advanced primary care” now used to describe some patient-centered medical home models.

The Seventh National Medical Home Summit, co-hosted by the Patient-Centered Primary Care Collaborative (PCPCC), will bring together the leading authorities and practitioners in the medical home field to discuss how it is working, where it has proven outcomes, what lessons have been learned, where it needs improvement, and what issues and challenges lie ahead. Two pre-conferences will highlight various recognition/accreditations programs and lessons from a mature and very successful medical home, respectively, followed by a joint plenary session with the National Population Health Colloquium. Medical Home plenary sessions will feature current research, an advanced medical home model at Iora Health, the patient voice, synergies with population health, culture as king, employer and union support of the PCMH, and the future of physician-led accountable care models. Three afternoon mini summits provide an in-depth look at clinical health coaching, lessons from PCMH implementation, and new medical neighbors. The training program allows for a deeper dive into the subject matter and includes pre-conference readings, an online course, and an online exam as well as required participation in one of the pre-conferences and the main Summit. Candidates earn a certificate of completion with a score of 70% or better on the exam.



**Jefferson**

**Special Benefit for Medical Home Training Program Certificate Holders:**

Participants who successfully complete the Medical Home Training Program offered in conjunction with the Seventh National Medical Home Summit are eligible to receive a 15% tuition discount for courses taken as part of the Master of Science degree programs offered through Thomas Jefferson University’s School of Population Health. To be eligible for this discount, Medical Home Summit attendees must meet all admissions requirements for the program and must apply by July 1, 2016. (This offer is only available for matriculated students). This offer is for new students only. For more information about Jefferson’s master’s programs in public health, health policy, healthcare quality and safety, applied health economics/outcomes research, as well as the PhD in Population Health Sciences, visit [www.Jefferson.edu/population\\_health](http://www.Jefferson.edu/population_health).

**HOTEL INFORMATION/RESERVATIONS**

The LOEWS Philadelphia Hotel is the official hotel for the **SEVENTH NATIONAL MEDICAL HOME SUMMIT** co-located with Population Health Colloquium. A special group-rate of \$199.00 single/ \$224.00 double per night (plus tax) has been arranged for Summit attendees. To preview the hotel website and reserve your room at the group rate, please visit the conference website at [www.MedicalHomeSummit.com](http://www.MedicalHomeSummit.com). You may also make a phone reservation by calling the Loews Reservation Center at 888-575-6397. When making your reservation, please refer to “Population Health-Medical Home Summit” in order to receive the group rate.

Reservations at the group rate will be accepted while rooms are available or until the cut-off date of **Monday, March 2, 2015**. After this date, reservations will be accepted on a space-available basis at the prevailing rate.

**LOEWS Philadelphia Hotel • 1200 Market Street • Philadelphia PA 19107**

**WHO SHOULD ATTEND:**

- Employers and employer coalitions
- Health plan administrators
- Hospital and health system executives and managers
- Practicing physicians and physician organizations
- Physician assistants, nurse practitioners, nurse case managers and other allied health professionals on the primary care team
- Community clinics and neighborhood health centers
- Patient advocate representatives
- Organizations representing vulnerable populations and individuals with special needs
- Disease management organizations
- Pharmaceutical companies and pharmacy benefit managers
- Health care information technology managers
- Accreditation organizations
- Federal, state, and local government health agencies
- Vendors and consulting firms specializing in medical home related products and services

**PARTICIPATION OPTIONS**

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PROS: subject matter immersion; professional networking opportunities; faculty interaction.



Onsite

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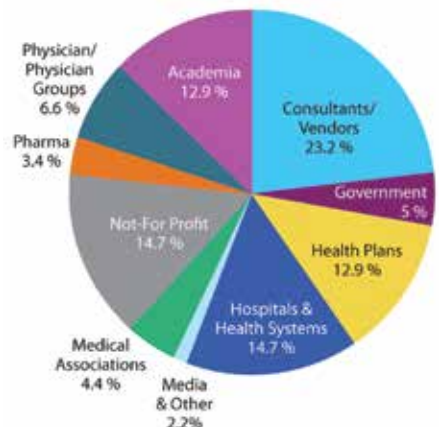


... or home

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**Medical Home Summit Breakdown of Attendees – 2014**



\*\*Not-For-Profit” includes consumer advocacy groups, foundations, and non-profit service agencies.



## MONDAY, MARCH 23, 2015

### 7:00 am Registration Opens

(Preconference participation optional: Required for Medical Home Certificate Program)

### PRECONFERENCE I: UPDATE ON PATIENT-CENTERED PRIMARY CARE RECOGNITION/ACCREDITATION

#### 8:00 am Welcome

**Patrice V. Sminkey, RN**, Chief Executive Officer, The Commission for Case Manager Certification (CCMC), Mount Laurel, NJ (Chair)

#### 8:15 am Medical Home Accreditation

**Dennis Schultz, MD, MSPH, FACOEM**, Midwest Regional Medical Director, QuadMed; AAAHC Surveyor, Accreditation Association for Ambulatory Health Care (AAAHC), Skokie, IL

#### 8:45 am NCQA's PCMH Recognition Program

**Patricia Marine Barrett, MHSA**, Vice President for Product Development, NCQA, Washington, DC

#### 9:15 am The URAC PCMH Practice Achievement Program

**Kylanne Green**, President and Chief Executive Officer, URAC, Washington, DC

#### 9:45 am Networking Break

#### 10:15 am Joint Commission Primary Care Home Initiative

**Lon M. Berkeley, BA, MS**, Project Director, Community Health Center Accreditation, The Joint Commission, Evanston, IL

#### 10:45 am Planetree Recognition Program

**Alan Manning**, Vice President of Operations, Planetree, Inc., Derby, CT

#### 11:15 am Final Audience Q&A

**Patrice V. Sminkey, RN**, Chief Executive Officer, The Commission for Case Manager Certification (CCMC), Mount Laurel, NJ (Moderator)

#### 11:45 am Preconference Adjournment

### PRECONFERENCE II: SETMA'S MEDICAL HOME JOURNEY—THE CONTINUING PURSUIT OF EXCELLENCE

#### 8:00 am Welcome

**James L. Holly, MD**, Chief Executive Officer, SETMA; Adjunct Professor, Family & Community Medicine, University of Texas Health Science Center San Antonio School of Medicine; Clinical Associate Professor, Department of Internal Medicine, School of Medicine, Texas A&M Health Science Center, Beaumont, TX (Chair)

#### 8:10 am PCMH Accreditation team — How to Build and Maintain an Accreditation Team for PCMH

**Theresa Bailey, LVN**, HCC Risk Specialists and EMR Trainer, Member Accreditation Team, Beaumont, TX

**Jayne Bryant, RN, BSN**, HCC Risk Specialists and EMR Trainer, Member Accreditation Team, Beaumont, TX

**Pat Crawford, CMOM, CMC, CMIS**, Director of Care Coordination, Member Accreditation Team, Beaumont, TX

**Jon Owens, BS**, Mechanical Engineer, Clinical Systems Engineer, Member Accreditation Team, Beaumont, TX

**Margaret Ross, RN, MSN**, Director of Operations, Member, Accreditation Team, Beaumont, TX

#### 8:40 am Unique Billing for PCMH — Transition of Care/HCC Risk Management Audits for PC-MH

**Jayne Bryant, RN, BSN**, HCC Risk Specialists and EMR Trainer, Member Accreditation Team, Beaumont, TX

**Theresa Bailey, LVN**, HCC Risk Specialists and EMR Trainer, Member Accreditation Team, Beaumont, TX

**James L. Holly, MD**, Chief Executive Officer, SETMA; Adjunct Professor, Family & Community Medicine, University of Texas Health Science Center San Antonio School of Medicine; Clinical Associate Professor, Department of Internal Medicine, School of Medicine, Texas A&M Health Science Center, Beaumont, TX

#### 9:00 am PCMH Community Council — the Staff, Value and Purpose of a Community Council for PC-MH

**Brenda Kerl**, Member, Patient Centered Medical Home; Member, SETMA Community Council, Beaumont, TX

**Samuel Kerl**, Member, Patient Centered Medical Home; Member, SETMA Community Council, Beaumont, TX

**Pat Crawford, CMOM, CMC, CMIS**, Director of Care Coordination, Member Accreditation Team, Beaumont, TX

**Richard W. Smith**, Member, Patient Centered Patient Home; Member, SETMA Community Council, Beaumont, TX

#### 9:30 am Data Informatics — the Power of Informatics and the Philosophy of Quality Metrics in PCMH

**Jon Owens, BS**, Mechanical Engineer, Clinical Systems Engineer, Member Accreditation Team, Beaumont, TX

**James L. Holly, MD**, Chief Executive Officer, SETMA; Adjunct Professor, Family & Community Medicine, University of Texas Health Science Center San Antonio School of Medicine; Clinical Associate Professor, Department of Internal Medicine, School of Medicine, Texas A&M Health Science Center, Beaumont, TX

#### 10:00 am BREAK

#### 10:15 am PCMH Story Telling — Value and Imperative

**Brenda Kerl**, Member, Patient Centered Medical Home; Member, SETMA Community Council, Beaumont, TX

**Samuel Kerl**, Member, Patient Centered Medical Home; Member, SETMA Community Council, Beaumont, TX

**Richard W. Smith**, Member, Patient Centered Patient Home; Member, SETMA Community Council, Beaumont, TX

#### 10:45 am PCMH Medical Student and Residency Externship

**Jerry P. Abraham, MD, MPH, CMQ**, Resident Physician, University of Southern California (USC) Family Medicine Residency Program at California Hospital; Trustee-Elect, American College of Medical Quality (ACMQ), Los Angeles, CA

**James L. Holly, MD**, Chief Executive Officer, SETMA; Adjunct Professor, Family & Community Medicine, University of Texas Health Science Center San Antonio School of Medicine; Clinical Associate Professor, Department of Internal Medicine, School of Medicine, Texas A&M Health Science Center, Beaumont, TX

#### 11:30 am Patient-Centered Conversations — Patient Activity, Engagement and Shared Decision Making — Transforming a Patient Encounter into a Real PCMH visit

**Jerry P. Abraham, MD, MPH, CMQ**, Resident Physician, University of Southern California (USC) Family Medicine Residency Program at California Hospital; Trustee-Elect, American College of Medical Quality (ACMQ), Los Angeles, CA

**James L. Holly, MD**, Chief Executive Officer, SETMA; Adjunct Professor, Family & Community Medicine, University of Texas Health Science Center, San Antonio School of Medicine; Clinical Associate Professor, Department of Internal Medicine, School of Medicine, Texas A&M Health Science Center, Beaumont, TX

#### 11:50 am Wrap-Up

**James L. Holly, MD**, Chief Executive Officer, SETMA; Adjunct Professor, Family & Community Medicine, University of Texas Health Science Center San Antonio School of Medicine; Clinical Associate Professor, Department of Internal Medicine, School of Medicine, Texas A&M Health Science Center, Beaumont, TX

#### 12:00 pm Preconference Adjournment

**DAY I: OPENING JOINT PLENARY SESSION  
WITH THE FIFTEENTH POPULATION HEALTH COLLOQUIUM**

**1:00 pm Welcome, Overview, and Expectations**



**David B. Nash, MD, MBA, FACP**, Dean, Jefferson School of Population Health, Thomas Jefferson University, Philadelphia, PA (Co Chair)



**Marci Nielsen, PhD, MPH**, Chief Executive Officer, Patient-Centered Primary Care Collaborative, Washington, DC, (Co Chair)

**1:30 pm Healthcare's Data-Driven Dialogue**



**Jeff Arnold**, Chairman and Chief Executive Officer, Sharecare, Atlanta, GA

**2:10 pm How I Messed Up Healthcare in America  
(Put Your Name Here)**



**Stephen K. Klasko, MD, MBA**, President and Chief Executive Officer, Thomas Jefferson University and TJUH System, Philadelphia, PA

**2:50 pm Networking Break in the Exhibit Hall**

**3:20 pm Humana at Home**



**Christopher Kay**, Senior Vice President and Chief Innovation Officer, Humana, Inc., Louisville, KY

**4:00 pm Panel—The Synergy Between Population Health  
and the Medical Home**



**Rushika Fernandopulle, MD, MPP**, Founder and Chief Executive Officer, Iora Health, Cambridge, MA



**Thomas Graf, MD**, Chief Medical Officer, Population Health and Longitudinal Care Service Lines, Geisinger Health System, Danville, PA



**Leslie Kelly Hall**, Senior Vice President of Policy, Healthwise Informed Medical Decision Foundation, Boise, ID



**Richard Snyder, MD**, Senior Vice President and Chief Medical Officer, Independence Blue Cross, Philadelphia, PA



**Fred Goldstein** (Invited), Interim Executive Director, Population Health Alliance; Founder, Accountable Health, LLC, Jacksonville, FL (Moderator)

**5:15 pm Closing Remarks**



**David B. Nash, MD, MBA, FACP**, Dean, Jefferson School of Population Health, Thomas Jefferson University, Philadelphia, PA (Co Chair)

**5:30 pm Joint Networking Reception**

**7:00 am Registration Open  
Networking Breakfast with Optional Table Topics**

**DAY II MORNING: OPENING PLENARY SESSION**

**THE CURRENT LANDSCAPE**

**8:00 am Welcome and Overview**



**Marci Nielsen, PhD, MPH**, Chief Executive Officer, Patient-Centered Primary Care Collaborative, Washington, DC (Co Chair)

**8:15 am Policy and Workforce Issues for the New  
Primary Care**



**Kavita Patel, MD**, Managing Director for Clinical Transformation and Delivery, Engelberg Center for Healthcare Reform, The Brookings Institution; Former Director of Policy, The White House, Washington, DC

**9:00 am What Does the Research Tell Us?**



**Lisa Dulsky-Watkins, MD**, Principal, Granite Shore Consulting, LLC, Ferrisburgh, VT



**Debbie Peikes, PhD**, Senior Fellow, Mathematica Policy Research, Princeton, NJ



**Robert L. Phillips Jr., MD, MSPH**, Vice President for Research and Policy, American Board of Family Medicine, Washington, DC



**Elana Gordon**, Health Care Reporter, WHYY Health & Science Show, The Pulse, Philadelphia, PA (Moderator)

**10:00 am BREAK**

**10:30 am Bringing It All Together at the Practice Level**



**Rushika Fernandopulle, MD, MPP**, Founder and Chief Executive Officer, Iora Health, Cambridge, MA

**11:15 am Managing Population Health in the Medical  
Home—Promise and Pitfalls**



**Jaan Sidorov, MD, FACP**, Author, Disease Management Care Blog; Health Care Consultant, Harrisburg, PA

**11:45 am NETWORKING LUNCH**

Optional Luncheon Networking Roundtables

## DAY II AFTERNOON: MINI SUMMITS

### MINI SUMMIT I: Clinical Health Coaching

- 1:15 pm**     **Welcome and Overview of the Mini Summit**  
**William K. Applegate, PhD, CPC**, Chief Executive Officer, Iowa Chronic Care Consortium and Founder of Clinical Health Coach® Training, West Des Moines, IA (Mini Summit Chair)
- 
- 1:30 pm**     **Architects for Health: Health Coaches in the Clinical Setting**  
**William K. Applegate, PhD, CPC**, Chief Executive Officer, Iowa Chronic Care Consortium and Founder of Clinical Health Coach® Training, West Des Moines, IA
- 
- 2:00 pm**     **Making it Work: Practical Considerations from Early Adopters of Health Coaching in the Medical Home**  
**Shirley Roberts, MA**, Principal, Roberts Health Solutions, Dallas, TX
- 
- 2:30 pm**     **Inserting Health Coaches into a Patient-Centered Team**  
**David Carlyle, MD**, Board Certified in Family Medicine, Hospice, and Palliative Medicine and Geriatric Medicine. McFarland Clinic, Ames, IA
- 
- 3:00 pm**     **Networking Break in the Exhibit Hall**
- 
- 3:30 pm**     **All Primary Care Staff are Health Coaches**  
**John Hickner, MD, MSC**, Head, Family Medicine, University of Illinois Chicago, Chicago, IL
- 
- 4:00 pm**     **Faculty Panel and Audience Q&A**  
**William K. Applegate, PhD, CPC**, Chief Executive Officer, Iowa Chronic Care Consortium and Founder of Clinical Health Coach® Training, West Des Moines, IA (Moderator)
- 
- 5:15 pm**     **Adjourn**

### MINI SUMMIT II: Lessons from PCMH Implementation

- 1:15 pm**     **Welcome and Overview of the Mini Summit**  
**Lisa M. Letourneau, MD, MPH**, Executive Director, Maine Quality Counts, Manchester, ME (Mini Summit Chair)
- 
- 1:30 pm**     **The Top 10 Lessons Learned from the AAFP Medical Home Experiences**  
**Amy Mullins, MD, FAAFP**, Medical Director, Quality Improvement, American Academy of Family Physicians (AAFP), Leawood, KS
- 
- 2:00 pm**     **Assuring Adequate Payment for Enhanced Primary Care—Lessons from the PCMH Pilots and Other Multi-Payer Experiences**  
**Lisa M. Letourneau, MD, MPH**, Executive Director, Maine Quality Counts, Manchester, ME
- 
- 2:30 pm**     **Key Factors in PCMH ROI Success and Disappointment**  
**Pamela Ballou-Nelson, PhD**, Process Improvement Consultant, Encore, a Quintiles Company, Houston TX
- 
- 3:00 pm**     **Networking Break in the Exhibit Hall**

- 3:30 pm**     **Key Factors in Successful Integration of Behavioral Health and Primary Care**  
**Kathryn Phillips, MPH**, Program Director, Patient-Centered Medical Home, Qualis Health, Seattle, WA  
**Anna D. Ratzliff, MD, PhD**, Assistant Professor, Associate Director for Education, Division of Integrated Care and Public Health, AIMS Center, University of Washington, Seattle, WA

- 
- 4:00 pm**     **Lessons from PCMH Implementation in New Zealand**  
**John Morgan, MD**, General Physician, Midlands Health Network, Hamilton, New Zealand  
**Helen Parker**, General Manager, Integrated Family Health Services, Midlands Health Network, Hamilton, New Zealand

- 
- 4:30 pm**     **Faculty Panel and Audience Q&A**  
**Lisa M. Letourneau, MD, MPH**, Executive Director, Maine Quality Counts, Manchester, ME (Moderator)

- 
- 5:15 pm**     **ADJOURN**

### MINI SUMMIT III: New Medical Neighbors

- 1:15 pm**     **Welcome and Overview of the Mini Summit**  
**Julie Schilz, BSN, MBA**, Director, Care Delivery Transformation, WellPoint, Denver, CO (Mini Summit Chair)
- 
- 1:30 pm**     **The Best Kept Secret in Your Medical Neighborhood—Evidence-Based Cardiology and Pulmonary Rehabilitation**  
**Jody Hereford, RN, BSN, MS, FAACVPR**, Principal, The Hereford Group, Boulder, CO  
**Marjorie L. King, MD, FACC, FAACVPR**, Director, Cardiac Rehabilitation Services, Helen Hayes Hospital; Assistant Clinical Professor of Medicine, Columbia University, New York, NY
- 
- 2:00 pm**     **Setting Local Public Health Priorities to Support Both Medical Homes and Population Health**  
**LaQuandra S. Nesbitt, MD, MPH** (Invited), Director, Louisville Metro Department of Public Health & Wellness, Louisville, KY
- 
- 2:30 pm**     **Collaboration between Medical Homes and Retail Clinics**  
**Patricia Marine Barrett, MHSA**, Vice President for Product Development, NCQA, Washington, DC  
**Plus a medical home and/or retail clinic representative**
- 
- 3:00 pm**     **Networking Break in the Exhibit Hall**
- 
- 3:30 pm**     **Oral Health and the Medical Home**  
**David Tayloe, MD**, Goldsboro Pediatrics, Goldsboro, NC
- 
- 4:00 pm**     **Faculty Panel and Audience Q&A**  
**Julie Schilz, BSN, MBA**, Director, Care Delivery Transformation, WellPoint, Denver, CO (Moderator)
- 
- 5:00 pm**     **Adjourn**



**DAY III: CLOSING PLENARY SESSION  
ISSUES AND CHALLENGES FOR THE ROAD AHEAD**

**7:00 am Registration Opens  
Networking Breakfast with Optional Table Topics**



**8:00 am Welcome and Overview**  
**John Iglehart**, *Founding Editor, Health Affairs; National Correspondent, New England Journal of Medicine, Washington, DC (Co Chair)*



**8:15 am PCMH from the Patient Perspective**  
**Christine Bechtel**, *President, Bechtel Health Advisory Group; Former Vice President, National Partnership for Women and Families, Washington, DC*

**+ Patient Partners**



**9:15 am Why Purchasers Love the Medical Home**  
**Chantel Sheaks**, *General Counsel, International Association of Machinists National IAM Benefits Trust Fund, Washington, DC*



**Laurel Pickering**, *Executive Director, Northeast Business Group on Health (NEBGH), New York, NY*



**Bruce Sherman, MD, FCCP, FACOEM**, *Medical Director, Employers Health Coalition, Inc., Canton, OH*



**Amy Gibson**, *Chief Operating Officer, Patient-Centered Primary Care Collaborative, Washington, DC (Moderator)*

**10:00 am Networking Break in the Exhibit Hall and Prize Drawing**

**10:30 am Recognition/Accreditation is Good but Culture is King**



**James L. Holly, MD**, *Chief Executive Officer, SETMA; Adjunct Professor, Family & Community Medicine, University of Texas Health Science Center San Antonio School of Medicine; Clinical Associate Professor, Department of Internal Medicine, School of Medicine, Texas A&M Health Science Center, Beaumont, TX*

**11:15 am Putting Primary Care Back in Control of Health Care ... with 21st Century Data Analytics and Tools**



**Farzad Mostashari, MD, MSc**, *Chief Executive Officer, Aledade; Former HHS National Coordinator of Health Information Technology, Bethesda, MD*

**12:00 pm What We've Learned, Where We Go from Here**



**Marci Nielsen, PhD, MPH**, *Chief Executive Officer, Patient-Centered Primary Care Collaborative, Washington, DC*

**12:15 pm SUMMIT ADJOURNMENT**

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You may register through either of the following:

- Online at [www.MedicalHomeSummit.com](http://www.MedicalHomeSummit.com).
- Fax/Mail/Email using this printed registration form. Mail the completed form with payment to the Conference registrar at 22529 39th Ave. SE, Bothell, WA 98021, or fax the completed form to 206-319-5303, or scan and email the completed form to [registration@hconferences.com](mailto:registration@hconferences.com). Checks or money orders should be made payable to Health Care Conference Administrators LLC. The following credit cards are accepted: American Express, Visa or MasterCard. Credit card charges will be listed on your statement as payment to HealthCare (HC) Conf LLC.

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The Summit will pay a reward for information regarding unauthorized sharing of Summit content. The reward will be one quarter (25%) of any recovery resulting from a copyright infringement (less legal fees and other expenses related to the recovery) up to a maximum reward payment of \$25,000. The payment will be made to the individual or individuals who in the opinion of our legal counsel first provided the factual information, which was necessary for the recovery. If you have knowledge regarding the unauthorized Summit content sharing, contact the Summit registration office.

**REGISTRATION BINDING AGREEMENT**

Registration (whether online or by this form) constitutes a contract and all of these terms and conditions are binding on the parties. In particular, these terms and conditions shall apply in the case of any credit/debit card dispute.

**GENERAL TERMS AND CONDITIONS**

Program subject to cancellation or change. If the program is cancelled the only liability of the Summit will be to refund the registration fee paid. The Summit shall have no liability regarding travel or other costs. Registration form submitted via fax, mail, email or online constitutes binding agreement between the parties.

**FOR FURTHER INFORMATION**

Call 800-503-6494 (Continental US, Alaska and Hawaii only) or 206-452-2025, send e-mail to [registration@hconferences.com](mailto:registration@hconferences.com), or visit our website at [www.MedicalHomeSummit.com](http://www.MedicalHomeSummit.com).

# MEDICAL HOME SUMMIT

**HOW TO REGISTER:** Fully complete the form below (one form per registrant, photocopies acceptable). Payment must accompany each registration (U.S. funds, payable to Health Care Conference Administrators, LLC).  
 ONLINE: Secure online registration at [www.MedicalHomeSummit.com](http://www.MedicalHomeSummit.com) • FAX: 206-319-5303 (include credit card information with registration)  
 MAIL: Conference Office, 22529 39th Ave SE, Bothell, WA 98021  
 FOR REGISTRATION QUESTIONS: PHONE: 800-503-6494 (Continental US, Alaska and Hawaii only) or 206-452-2025, Monday-Friday, 7 AM - 5 PM PST  
 E-MAIL: [registration@hccconferences.com](mailto:registration@hccconferences.com)

**COMPLETE THE FOLLOWING. PLEASE PRINT CLEARLY:**

NAME \_\_\_\_\_

SIGNATURE OF REGISTRANT - REQUIRED \_\_\_\_\_

JOB TITLE \_\_\_\_\_

ORGANIZATION \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY/STATE/ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_

E-MAIL \_\_\_\_\_

Special Needs (Dietary or Physical)

**ONSITE CONFERENCE ATTENDANCE**

- PRECONFERENCES** Monday, March 23  
 (Choose one only — a precon is required for the Medical Home Training Program)  
 PRECONFERENCE I: Update on Patient-Centered Primary Care Recognition/Accreditation \$ 495  
 PRECONFERENCE II: SETMA's Medical Home Journey—The Continuing Pursuit of Excellence \$ 495

- CONFERENCE –STANDARD RATE** (Does not include Preconference):  
 Through Friday, January 23, 2015\* \$1,195  
 Through Friday, February 20, 2015\*\* \$1,595  
 After Friday, February 20, 2015 \$1,995

- SPECIAL PROVIDER RATE\*\*\*\*** (Does not include Preconference):  
 Through Friday, January 23, 2015\* \$ 995  
 Through Friday, February 20, 2015\*\* \$1,295  
 After Friday, February 20, 2015 \$1,595

- SPECIAL ACADEMIC/GOVERNMENT/CLINIC RATE\*\*\*\***  
 (Does not include Preconference):  
 Through Friday, January 23, 2015\* \$ 595  
 Through Friday, February 20, 2015\*\* \$ 795  
 After Friday, February 20, 2015 \$ 995

- PLEASE SELECT YOUR MINI-SUMMIT** Tuesday, March 24 (Choose one):  
 MINI SUMMIT I: Clinical Health Coaching  
 MINI SUMMIT II: Lessons from PCMH Implementation  
 MINI SUMMIT III: New Medical Neighbors

**MEDICAL HOME TRAINING PROGRAM:**  
 Includes preconference readings and questions, online course and post-conference online examination. Requires preconference and conference registration: \$ 395

- GROUP REGISTRATION DISCOUNT** (Does not include Preconference):  
 Three or more registrations submitted from the same organization at the same time receive the following discounted rates for conference registration only. To qualify, all registrations must be submitted simultaneously. Rates are per person.  
 Through Friday, January 23, 2015\* \$ 795  
 Through Friday, February 20, 2015\*\* \$1,095  
 After Friday, February 20, 2015 \$1,395

**CONFERENCE ELECTRONIC MEDIA:**  
 Onsite Attendees — Following the Summit, the video and presentations are made available in the following formats. To take advantage of the discounted prices below, you must reserve media WITH your Summit registration:  
 Flash Drive (\$129 + \$15 shipping) \$ 144     6 months' access on Web \$ 129

**SPECIAL SUBSCRIPTION OFFER FOR BOTH ONSITE AND WEBCAST ATTENDEES:**  
 You can purchase an annual subscription to *Accountable Care News*, *Health Insurance Marketplace News*, *Healthcare Innovation News*, *Medical Home News*, *Population Health News*, *Predictive Modeling News* or *Readmissions News* for only \$295 (regular rate \$468) when ordered with your conference registration.

<input type="checkbox"/> <i>Accountable Care News</i>	\$ 295	<input type="checkbox"/> <i>Population Health News</i>	\$ 295
<input type="checkbox"/> <i>Health Insurance Marketplace News</i>	\$ 295	<input type="checkbox"/> <i>Predictive Modeling News</i>	\$ 295
<input type="checkbox"/> <i>Healthcare Innovation News</i>	\$ 295	<input type="checkbox"/> <i>Readmissions News</i>	\$ 295
<input type="checkbox"/> <i>Medical Home News</i>	\$ 295		

**WEBCAST CONFERENCE ATTENDANCE**

All Webcast registrants are automatically registered for the preconference, conference and the Medical Home Training Program.  
 Webcast conference registration includes the live Internet feed from the Summit, plus six months of continued archived Internet access, available 24/7.

- INDIVIDUAL REGISTRATION:**  
 Through Friday, January 23, 2015\* \$ 795  
 Through Friday, February 20, 2015\*\* \$1,095  
 After Friday, February 20, 2015 \$1,395

- SPECIAL ACADEMIC/GOVERNMENT/CLINIC RATE\*\*\*\*:**  
 Through Friday, January 23, 2015\* \$ 495  
 Through Friday, February 20, 2015\*\* \$ 595  
 After Friday, February 20, 2015 \$ 695

**GROUP REGISTRATION:**  
 Group registration offers the substantial volume discounts set forth below.  
 Group registration permits the organizational knowledge coordinator either to share conference access with colleagues or to assign and track employee conference participation. Rates are per person.  
 Conference Access:     5 or more \$595 each     20 or more \$395 each  
     10 or more \$495 each     40 or more \$295 each

See INTELLECTUAL PROPERTY POLICY, page 6.  
**CONFERENCE ELECTRONIC MEDIA:**  
 Webcast attendees — Following the Summit, the video and presentations are made available on a flash drive. To take advantage of the discounted price below, you must reserve media WITH your Summit registration:     Flash Drive (\$129 + \$15 shipping) \$ 144  
 (All Webcast attendees automatically receive 6 months access on web.)

\* This price reflects a discount for registration and payment received through Friday, January 23, 2015.  
 \*\* This price reflects a discount for registration and payment received through Friday, February 20, 2015.  
 \*\*\* Provider is a hospital, Long Term Care, home health, physician, or hospice organization or its association.  
 \*\*\*\* For the purpose of qualifying for a discounted rate: (1) "academic" shall apply to individuals who are full time teaching staff or full time students at an academic institution (i.e., a faculty member at a medical school or hospital residency program who also sees patients in a provider, not an academic; (2) "government" shall apply to individuals who are full time employees of federal, state or local regulatory agencies (i.e., a State university health system or local public hospital is a provider, not government); and (3) "clinic" shall apply to individuals who are full time employees of a Federally Qualified Health Center or safety net clinic. This rate does not include the Preconference for onsite attendees.

**PAYMENT**  
 The use of a registration discount code cannot be the basis of requesting a partial refund of fees already paid.

Discount Code:

**TOTAL FOR ALL OPTIONS, ONSITE OR WEBCAST:**

Please enclose payment with your registration and return it to the Registrar at Medical Home Summit, 22529 39th Ave SE, Bothell, WA 98021, or fax your credit card payment to 206-319-5303.  
 You may also register online at [www.MedicalHomeSummit.com](http://www.MedicalHomeSummit.com).  
 Check/money order enclosed (payable to Health Care Conference Administrators LLC)  
 Payment by credit card:  American Express     Visa     Mastercard  
 If a credit card number is being given to hold registration only until such time as a check is received it must be so noted. If payment is not received by seven days prior to the Summit, the credit card payment will be processed. Credit card charges will be listed on your statement as payment to HealthCare (HC) Conf LLC.

**REGISTRATION BINDING AGREEMENT**  
 Registration (whether online or by this form) constitutes a contract and all of these terms and conditions are binding on the parties. In particular, these terms and conditions shall apply in the case of any credit/debit card dispute. For webcast and onsite registrants there will be no refunds for "no-shows" or cancellations.

ACCOUNT # \_\_\_\_\_

EXPIRATION DATE \_\_\_\_\_ SECURITY CODE \_\_\_\_\_

NAME OF CARDHOLDER \_\_\_\_\_

SIGNATURE OF CARDHOLDER \_\_\_\_\_



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