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THE 2ND ANNUAL PATIENT ADVOCATE CONFERENCE

Strategies for Advocates in all Healthcare Settings

Pre-Show Workshop: Certificate in Professional Patient Advocacy

DECEMBER 6, 2012

Conference

DECEMBER 7, 2012

8:00 am - 5:15 pm

Renaissance Orlando SeaWorld®
Orlando, Florida



Thank you to our sponsors



www.patientadvocatetraining.com/conference

Letter from the conference chair

Dear Colleague,

With the confirmation by the Supreme Court that the Affordable Care Act (ACA) is constitutional, all of its interventions and initiatives can now move forward.

This means that there are some clear challenges – and plenty of opportunities – quickly coming down the pike for patient advocates and other members of the care coordination team.

The good news is that incentives and strategies that are included in the ACA will improve the delivery of care and change how care will be paid for – with a greater focus on recognizing quality vs. quantity. At the same time, the disruption and confusion within the healthcare system will intensify for providers, payers, and especially the patient. But in the midst of change comes a striking window of opportunity.

Amidst the modern healthcare backdrop, patient advocates have a tremendous opportunity to do what they do best – advocate for the individual to ensure they have a voice in securing access to safe, effective, and quality care for themselves.

The Professional Patient Advocate Institute, a community that brings together advocates from settings throughout the care continuum, has developed a robust conference to allow advocates to come together to learn, network, and share ideas in a relaxed setting.

This year, the 2nd Annual Patient Advocate Conference has an expanded agenda (comprised of separate “independent” and “hospital” educational tracks) that provides answers to the challenges you face in your practice and insights on how to promote the highest quality advocacy. Driven by a select group of leaders, the conference shares expertise and provides practical takeaways that you can bring to your work setting to help ensure that patients have a voice, are included as part of the treatment team, and have the information to choose the care that meets their individual needs.

I look forward to seeing you at the 2nd Annual Professional Patient Advocate Conference on December 7, 2012, at the Renaissance SeaWorld® Hotel in Orlando, Florida. Come and join your peers to exchange ideas, discuss challenges and leave with ideas and solutions that will enhance your practice as we enter an exciting 2013 – and beyond.



With Regards,

Anne Llewellyn, RN-BC, MS, BHSA, CCM, CRRN
Conference Chair for the 2nd Annual Patient Advocate Conference

Attend the 2nd Annual Patient Advocate Conference and learn:

- Why patient advocacy is one of the solutions to ensure patient- and family-centered care.
- Strategies that will help you meet the needs of consumers and change behavior to improve health and wellness.
- Tactics for navigating through case management and insurance issues of complex medical patients.
- What is value-based purchasing and what it means to you as a patient advocate.
- How to improve patient satisfaction.
- How to ensure effective physician office visits for your patient (and the advocate).
- Innovative ways to enhance your patient advocacy practice.
- How to use social media and other communication tools to improve communication for patients, families, and friends.
- The value of a life care plan for those with catastrophic and chronic conditions.
- Collaboration tactics to improve the patient experience.
- New ideas and solutions to ensure a just culture for all who transition through the care continuum.

Who should attend?

- Patient/Healthcare Advocates
- Patient Relations & Patient Safety
- Behavioral Health Professionals
- Case Managers
- Estate Attorneys
- Financial Planners
- Geriatric Care Managers
- Administrators
- Legal Nurse Consultants
- Life Care Planners
- Nurses
- Social Workers
- Ombudsmen
- Pharmacists
- Physicians
- Others responsible for improving the Patient Experience

PRE-SHOW WORKSHOP

CERTIFICATE IN PROFESSIONAL PATIENT ADVOCACY

December 6, 2012 | 8:00 am - 5:15 pm
Renaissance Orlando SeaWorld® | Orlando, Florida

This all-day workshop provides an extensive overview of patient advocacy, including the skills needed to be an effective advocate and the knowledge to sharpen case and care management skills. This course is an introduction to advocacy for those looking to explore the emerging role of advocacy as well as those who want to move into private advocacy practice.

This workshop can be taken as a step toward earning a Certificate in Patient Advocacy or as a stand-alone educational opportunity, worth 11 hours of Continuing Education credits (CEs).

Here are some of the important topics that will be covered by the workshop:

- Assessing, prioritizing, and coordinating patient care based on needs, desires, interviews and records.
- Helping patients and their families understand medical terms, diagnosis and treatment options.
- Providing an understanding of insurance, co-pays, provider options, and programs to extend benefits.
- Helping to coordinate among multiple providers, including negotiation of bills, resolution of disputed billing and obtaining approval for services.
- Evaluating your own business skills in order to create a viable plan, including marketing, service agreements and operational considerations.



THE 2ND ANNUAL PATIENT ADVOCATE CONFERENCE

DECEMBER 7, 2012

8:00 am - 5:15 pm | Renaissance Orlando
SeaWorld® | Orlando, Florida

Opening Keynote

8:35-9:15 am Health Advocacy – So What’s the Big Deal?



Speaker: Trisha Torrey, AdvoConnection.com/EveryPatientsAdvocate.com

At this moment in history, critical factors are colliding to produce an environment that is ripe for patient advocacy — baby boomers continue to age, advances in medicine are fast emerging to manage chronic conditions, technology is improving communication, and skyrocketing costs are wreaking havoc on an already dysfunctional healthcare system and economy. Smart people — health advocates — realize that they play an important role in improving the experiences of patients and their loved ones as they navigate a complex healthcare system. But for many of us, it’s not just a role; it’s a calling. We want to change the status quo and deliver a much higher bar for the way that patients are cared for in the healthcare arena. Yes — advocacy really is a big deal! And it’s changing the face of modern healthcare.

Independent Track

**9:20-10:00 am The Purpose of My Call Today...
“Marketing for the Private Practice Advocate”**

Speaker: Anna Inglett, President, Putnam Health Advocates

If a business does not have sales or activity generating sales, it will fail. It’s that simple. Advocates are caring, compassionate, people; not hard-charging sales jocks and jockettes. In this engaging presentation we examine why it is difficult for caring, compassionate people to sell themselves. How do we do that and why are we so afraid to pick up the telephone and start marketing ourselves? If we are in our own way, how do we get out of the way? We will explore techniques that will help advocates chart a roadmap to success by understanding how to bridge care and compassion with effective self-marketing strategies.

Hospital Track

**9:20-10:00 am Value Based Purchasing: The
Evolving Role of Hospital Patient Advocacy**

Speaker: Jessica Maack-Rangel, RN, MS, Director, Patient Safety and Customer Relations, Texas Health Resources/THFW

Healthcare is at a turning point. The industry is under intense scrutiny to improve quality, ensure safety and reduce costs. How is your organization responding to this call to action? Today with the emphasis on ‘patient-and family centered’ care, the hospital patient advocate is viewed as the voice of the patient and the family when they are in an acute care hospital, a specialty hospital, a skilled care facility or another in-patient setting. The Joint Commission and Centers for Medicare and Medicaid both require that organizations have processes and staff in place that can meet concerns patients and their families may have regarding their stay. This session will review Value Based Purchasing and the impact on the hospital patient advocate.

Independent Track

10:00-10:45 am How to Legally Bulletproof Your Patient Advocacy Business

Speaker: Dalia Al-Othman, Esq., President and CEO, Health Care Navigators, LLC

Private patient advocacy is still a relatively new profession. As such, the law has not yet “caught up” with this burgeoning profession in terms of clearly defining and outlining the contracts, agreements, and rules to which we patient advocates must (or should) adhere in our practice. This presentation will teach those of you who work in private patient advocacy how to legally bulletproof your business and make it as successful as possible under the law (giving you all of the “Legal Do’s and Don’t’s” in the process). The presentation will show you how to keep your business safe from lawsuits, competitive in the marketplace, savvy in its contracts and agreements, and ethical in all of its dealings.

10:45-11:00 am Break

11:00- 11:45 am The Successful Physician Visit: Best Practices for Advocates

Speakers: Linda Chamberlain, J.D., CMC, Founder, Aging Wisely LLC
Shannon Martin, MSW, CMC, Director of Communication, Aging Wisely LLC

For elderly patients and those with chronic conditions, it is vital to make the best use of physician visits. Visiting multiple providers, managing multiple conditions and medications, communication and timing challenges all contribute to poor coordination and less effective healthcare outcomes for those with multiple conditions and the elderly. Patient advocates can help patients improve the quality of their healthcare through better management. This presentation will outline best practices for advocates to help patients realize successful outcomes from physician visits and better coordinated care overall. Participants will be given tools and checklists to more easily manage physician visits, will be better prepared to educate clients/families on this topic, and will discuss challenges and case points.

11:45 am-12:15 pm Bottles, Blisters and Behavior: Insights into Helping to Change Behaviors

Speaker: Robert E Wright, RN, PhD, FACHE, President/CEO, Behavioral Education and Research Services, Inc.

Mark Twain once said, “Nothing needs changing so much as other people’s habits.” While medical treatment is patient-centered and outcomes-oriented, we rarely treat patients differently because of their gender, age or color. We determine the disease, establish the care plan and execute treatment. This presentation examines behavior and provides an introduction into why people behave the way they do. Attendees will develop an insight into how to work with their patients to significantly improve adherence with their panel of patients through the use of therapeutic behavior management.

Hospital Track

10:00-10:45 am Nine Domains of Care: A Guide to Effective Hospital Patient Advocacy

Speaker: Amy Wellington, Director of Patient & Guest Relations, Boca Raton Regional Hospital

Gaining knowledge and skills around improving the patient experience is crucial to not only our function as healthcare patient advocates, but as collective voices reaching for an ever-improving patient experience. To aid in the development of fellow advocates and the overall profession, the Society of Healthcare Consumer Advocacy has identified Domains of Practice as being key skills and knowledge for advanced competency in the role of a patient and consumer advocate. This session will provide an overview of the Nine Domains of Practice and how they can enhance your practice.

10:45-11:00 am Break

11:00-11:45 am The Other Faces of Advocacy: Meeting the Holistic Needs of Complex Medical Patients

Speakers: Laura Ostrowsky, RN, CCM, Director of Case Management, Memorial Sloan-Kettering Cancer Center
Robin Campbell, RN, BSN, MPHA, Insurance Liaison Manager in Case Management, Memorial Sloan-Kettering Cancer Center
Sylvia Corbin, BS, MS, Associate Director of Memorial Sloan-Kettering Cancer Center’s Patient Financial Services Department

Many people associate patient advocacy with the patient representatives, advocates or ombudsman’s department but there are other faces of advocacy in health care. After this session, you’ll come away with more awareness about these other facets of advocacy and the role they play in the context of case management and insurance navigation. Plus, you’ll gain knowledge about the successes in ensuring access to specialty care.

11:45 am-12:15 pm Jack of All Trades, Master of Conflict: Nurture Thyself

Speaker: Rebecca Lefebvre, RN, BSN, BSW, Nurse Consultant

Hospital patient advocates are jack-of-all-trades and masters of conflict. They are drawn into the most emotionally charged and chaotic situations within the hospital and provide executive-level service recovery. On any given day, they wear legal, financial, quality, safety, and customer services hats. The hospital patient advocate must understand and have immediate access to each service and department within the organization. The success and health of the associate in this role requires expert communication skills and the development of strong relationships. This presentation will explore the extreme pressures and expectations faced by the Hospital Patient Advocate and how to “nurture thyself,” maintain sanity, and avoid burn-out.

Keynote Luncheon

12:15-1:30 pm It's About Caring for Each Other: The CaringBridge Story

Speaker: Sona Mehring, Founder & CEO, CaringBridge



Sona Mehring is the CEO and Founder of CaringBridge, the non-profit social network offering ways for people to care for each other during important health events. Ms. Mehring will share her journey, starting with the first CaringBridge site in 1997, to the more than 400,000 sites that have been created to date. You'll learn about the profound effect that CaringBridge continues to have not only on the families involved, but also how it's changed the way that people have communicated in what are often tragic and stressful situations. Sona will also talk about emerging practices at CaringBridge and how they continue to focus on bringing communities of support together in a private, respected online space.

Independent Track

1:20-2:00 pm Life Care Planning: The Roadmap for Successful Advocacy

Speaker: Wendie A. Howland, MN, RN-BC, CRRN, CCM, CNLCP, LNCC, Principal, Howland Health Consulting, Inc. Life Care Planning, Legal Nurse Consulting, Case Management and Editor, JNLCP

American author H. Stanley Judd once said, "A good plan is like a roadmap: it shows the final destination and usually the best way to get there." Easily said, but where to start? When advocating for an elder with complex medical needs, a disabled child or adult, or someone who has experienced a catastrophic illness or injury, it can be difficult to see past daily challenges to prepare for future needs. A nurse life care planner presents a document to guide your decision-making now and for life expectancy – a roadmap for care that will show you the way to successful advocacy. Come learn about this resource for your successful advocacy practice from two experts in the field at this dynamic, entertaining, and informative presentation.

2:00-2:45 pm Building a Private Patient Advocate Practice without Dependence on Billable Hours

Speakers: Robert E. O'Toole, President, Informed Decisions, LLC
James L. Ferry, Founder and President/CEO at Coaching Caregivers LLC and James L. Ferry

Anticipating deep cuts in Medicare and Medicaid, many elder advocates are setting up private businesses motivated by selective data such as "more than 65 million people spend an average of 20 hours per week providing care for their loved one." Their revenue model is typically the billable hour (e.g., elder attorneys, care managers, home care providers, adult day programs, among others). They think the key to success in business is "Find a need and fill it."

The problem is that "need" doesn't pay the bills. "Demand" does. The 2010 Census shows that only a small percentage of caregivers in need of advocacy can afford many billable hours. Several attempts at persuading caregivers to enroll in aid subscription plans have failed. This presentation will discuss using a "micro-pricing" model combined with non-traditional elder service providers (employers, banks, faith-based organizations, labor unions, membership associations), to provide comprehensive caregiver support as a worker/depositor/member free benefit. This model enables local elder services providers to provide advocacy and support to a much larger percentage of those in need while generating a new source of revenue not dependent on the billable hour.

Hospital Track

1:20-2:00 pm Advance Care Planning: Make a Difference for Patients and Their Families

Speakers: Paul Malley, MA, President, Aging with Dignity
M. Jane Markley, RN, MEd, FACHE, PMP, President, M. Jane Markley Consulting, LLC

The hospital patient advocate's role is to listen to their patient, research and gather information so that their client can make informed decisions about their plan of care, and provide objective advice to their client as they navigate through the complex and fragmented healthcare system.

This presentation will focus on the patient advocate's role in facilitating and encouraging advance care planning discussions among patients and families well in advance of a health care crisis. Advanced directives are mandatory for hospitals to obtain so care can be directed according to their wishes. As hospitals systems transition to accountable care organizations and work collaboratively with medical home models, the hospital patient advocate will be more and more responsible for educating the patient/family about advanced care planning. Attendees will learn new approaches to advance care planning that frame the process in terms that are both patient and family centered.

2:00-2:45 pm Patient Rounding for Reducing Complaints

Speaker: Nancy Luttrell, RN, MSN, Patient Advocate/QRM Nurse, City Hospital

Mock scorecards, interactive blueprints, quality dashboards... Hospitals are frantically seeking out any advantage that might help them excel in a fast-approaching, mandatory competition with millions of dollars on the line. Value-based purchasing (VBP), a program authorized by the Patient Protection and Accountable Care Act of 2010, gives the Centers for Medicare & Medicaid Services (CMS) the power to base a portion of hospital reimbursement payments on how well hospitals perform in 25 core measures including patient satisfaction. Today, hospitals cannot focus their efforts to improve the patient experience on only a checklist of activities, but rather make them part of a broader strategic direction. Many healthcare leaders believe a best practice to improve patient and provider satisfaction is patient rounding. This session will discuss data on how rounding increases patient satisfaction scores, results in fewer patient complaints post discharge and increased collaboration between the patient advocate, nursing staff and hospital leadership.

Independent Track

2:45-3:30 pm Medical Tourism Basics – A New Option for Your Clients

Speaker: Christina deMoraes, BA, Founder, International Medical Tourism Chamber of Commerce

As healthcare continues to become more expensive and clients search for alternatives, traveling abroad for care can be an appealing option both in terms of care and cost. Are you prepared to navigate your client through such an option? Your advocacy services are essential but there is a great deal to learn about this niche. Aftercare and support services must be coordinated in the destination country to make the patient's experience optimal and safe. Christina deMoraes has been assisting American patients seeking care in Brazil for 10 years. She is the founder of the International Medical Tourism Chamber of Commerce, an organization that supports the advocacy aspects of helping to assure patients of excellent medical outcomes abroad. She will provide us with some background information about expanding your services to offer "Global Patient Advocacy."

3:30-3:45 pm Break

3:45-4:30 pm Understanding Federal Privacy Laws and the Impact on Patient Advocacy Practice

**Speakers: Doug Hall, RN, President, Pulse of Florida
Amy Cuykendall, Esq., President, Core Care Patient Advocates**

Healthcare is ever-changing and evolving. Computer-based patient records, videoconferencing, electronic mail, social media and telehealth are just a few of the practices that have become common in the delivery of care. This session will distill federal regulations, such as HIPAA and HITECH, address the challenges they bring to patient advocates and provide tips you can use to ensure compliance.

4:30-5:15 pm When Insurers Deny Payment, What You Can Do to Minimize Patient Responsibility.

Speaker: Stacy Gearhart, Esq., President/CEO, AdviCare

Insurers often deny coverage for medically necessary services, leaving patients focusing on how to pay for healthcare and not on getting well. While most insurance policies provide for member appeals, the member/patient is often limited to just one appeal under the policy. It is very important that patient advocates recognize the true reason why the insurer is not paying the claim and provide the best argument with any supporting information the first time the matter is appealed. It may be the only shot at getting the service covered.

5:15 pm Conference Adjourns

Hospital Track

2:45-3:30 pm A Just Culture for Healthcare

Speaker: Louise Schwartz, MS, RN-C; Specialist: Value Based Purchasing Department of Quality and Patient Safety New York Presbyterian Medical Center

"Just Culture" is a defined set of values, beliefs, and norms about what is important, how to behave, and what behavior choices and decisions are appropriate related to occurrences of human error or near misses. This presentation will discuss Just Culture, history, principles, where it has been implemented and its effectiveness, how it works within the context of a culture of safety, and should/could it be in all health facilities.

3:30-3:45 pm Break

3:45-4:30 pm Journey to Excellence: Improving the Patient Experience

**Speakers: Renee Hurley, M.Ed., LPC, Director of Patient Relations, Monongahela Valley Hospital
Lynda Nester, RN, BSN, MS, Assistant Vice President of Nursing, Monongahela Valley Hospital**

With the onset of HCAHPS and Value Based Purchasing, Monongahela Valley Hospital knew they had to focus their efforts on improving employee satisfaction, as it had a direct impact on patient satisfaction scores and reimbursement levels. This session will explain how this organization designed a program allowing staff to have "buy-in" to a new culture which has led to improved outcomes, increased staff accountability, and overall improvements in the patient and family experience.

4:30-5:15 pm Advocating for the Military Family: Proactive Case Management and Resource Optimization

**Speakers: Marjorie Ingelsby, RN, CPHQ, CCM, TNCC, Lead Case Manager, Naval Hospital Jacksonville
Victoria Perez, BSN, RN, CCM, Pediatric Case Manager, Naval Hospital Jacksonville**

The military family faces many unique challenges: every three year relocations, arduous physical training, separation from family and friends and pre/ during/ and post deployment cycles.

Recognizing the factors which stress the military family, the case manager can proactively identify those individuals and groups who may be at risk for psychological, physical and ethical ordeals. Under the guidance of the Department of Defense and the Bureau of Medicine and Surgery, the military case manager assesses the needs of the service member and the family, and when appropriate, arranges, coordinates, monitors, evaluates, and advocates for a package of multiple services to meet the individual and family needs. At the Naval Hospital Jacksonville, Florida and its Branch Health Clinics in Georgia and Florida, the case managers serve as the advocates for the military families who are negotiating the complexities of the civilian and military healthcare systems.

5:15 pm Conference Adjourns

THE 2ND ANNUAL PATIENT ADVOCATE CONFERENCE



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2. Select Your Registration Package

REGISTRATION TYPE	Pre-Show Workshop	Patient Advocate Conference	Pre-Show Workshop & Patient Advocate Conference
EARLY BIRD Non Member Through 11/19/12	\$700	\$495	\$1,195
Regular Non Member After 11/19/12	\$895	\$595	\$1,295
EARLY BIRD Member Through 11/19/12	\$700	\$295	\$895
Regular Price Member After 11/19/12	\$895	\$395	\$995
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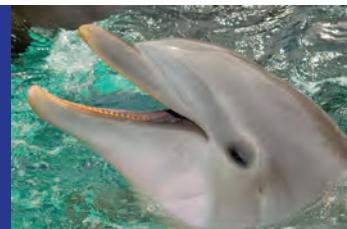
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