



## Schedule of Educational Programs and Activities

*The PPS Annual Conference strives to provide the most current business management education available to Physical Therapists and their staff working in Private Practice. Conference speakers represent a wide variety of backgrounds, including practitioners, academics, researchers, and commercial vendors. While some of the educational content comes from proprietary sources, all information provided to attendees at the PPS Annual Conference is intended to be unbiased.*

Wednesday, October 30, 2019

8:30 AM – 8:00 PM      **Registration Open – Attendees and Exhibitors**

12:30 PM – 3:00 PM      **A01. Administrators Certificate Program: Business Operations (Module 1 of 6)**  
Connie Ziccarelli (Rehab Management Solutions LLC)

**.25 CEUs/2.5 contact hours**

The health care landscape is ever-changing. Time equals money and finding ways to leverage our time through business operation processes can be a daunting task. Becoming more efficient and consistent while remaining compliant with 3<sup>rd</sup> party payer rules and regulations is a key to the success of every practice administrator. In addition, every practice administrator should recognize and understand the value of team engagement and staff retention. This module will offer practice administrators education on the critical success factors to improve the overall operations of a practice that impact bottom line. We will be taking an in-depth look at reimbursement cycle management best practices as well as employee engagement and retention ideas.

*Upon completion of this course, the participant should be able to:*

1. Recognize how to ease the credentialing processes, build & foster relationships with 3<sup>rd</sup> party payers, and manage fee schedules for maximum reimbursement.
2. Recognize ways to enhance the revenue cycle through management of the critical success factors.
3. Establish a plan to manage corporate compliance tasks, and understand the value of team engagement and staff retention

1:00 PM – 5:00 PM

**Pre-Conference Workshops (Separately Ticketed Events)**

**W01. Payment and Reimbursement Update**

Janet Shelley, PT, DPT (Medical Billing Center)

**.4 CEUs/4 contact hours**

The PPS Payment Policy Committee will present updates on the most relevant payment and reimbursement topics for the private practice physical therapist. This session will include updates about Medicare regulations, coding changes, commercial payer activity, and policies affecting therapy providers. The session will allow time for Q&A and will provide multiple resources developed by the Private Practice Section to assist members with navigating the reimbursement landscape.

*Upon completion of this course, the participant should be able to:*

1. Define physical therapy coding and billing requirements as dictated by the major payers in the industry, including: Medicare; Medicaid; and commercial payers.
2. Identify PPS resources on payment and reimbursement.
3. Understand the most significant risk areas for audits, specific to private practice and outpatient rehabilitation.
4. Define which physical therapists are currently mandated to participate in the Merit-based Incentive Payment System (MIPS).
5. Employee strategies to identify utilization management policies and identify APTA and PPS resources to address.

**W02. Creating Your Patient's Experience: Your Whole Team Trained for Patient and Business Success**

Jerry C. Durham, PT (dbajd, LLC)

Mark Milligan, PT, DPT (Anywhere Healthcare)

**.4 CEUs/4 contact hours**

Physical Therapy practices will continue to see decreased reimbursement, decreased employee loyalty and a greater loss of financial freedom if they do not understand their patients' experiences within their practice! The future of a successful physical therapy practice is in leveraging its team (all employees) to maximize the patient experience for greater patient and business outcomes. This team includes front desk, back office, providers, and aides. A coordinated TEAM will keep your practice running more smoothly as they will tie all the components of the patient experience together, from first phone call all the way through the completion of care and beyond! Your coordinated TEAM is your practice's greatest asset! There are no new products or new services that will have the same return on investment as investing in your TEAM.

This 4-hour workshop provides a successful process that facilitates the development of a new team or the revitalization of an existing team. Whether

your team is a large existing practice or a new practice start-up, you will rapidly increase its effectiveness with the use of these teamwork tools and skills to improve patient outcomes and increase bottom line success!

*Upon completion of this course, the participant should be able to:*

1. Articulate the importance of knowing the patient experience and know how it relates to your practice.
2. Define the roles and responsibilities of the team (staff) in building the therapeutic alliance within your patients' experiences.
3. Identify and understand the importance of the therapeutic alliance needed for maximal patient outcomes and business outcomes.
4. Outline and list the roles and responsibilities of your team (staff) as they relate to the patient experience.
5. Integrate principles of therapeutic alliance and team training into your practice.

1:00 PM – 5:00 PM

**Peer2Peer NetWorks Activities (for Peer2Peer NetWorks Members only)**

3:15 PM – 5:15 PM

**A02. Administrators Certificate Program: Human Resources (Module 2 of 6)**

Diane McCutcheon (Account Matters, Inc.)

Christina Ryan (Account Matters, Inc.)

**.2 CEUs/2 contact hours**

This session focuses on the essential human resource functions most private practices encounter on a regular basis. This session will outline the value of attracting and retaining a productive workforce, the importance of a new employee orientation, and the significance of job descriptions, setting standards of performance and performance reviews. We will discuss: how maintaining an efficient operation will improve your bottom line; why effective leadership is necessary to motivate and lead a successful team; various ways to keep lines of communication open; company policies and procedures; and other HR functions designed to keep your practice legally compliant.

*Upon completion of this course, the participant should be able to:*

1. Better limit liabilities to a practice by meeting legal compliance requirements and maintaining superior operational efficiency through a productive workforce resulting in an improved bottom line.
2. Improve systems of accountability by implementing job descriptions and standards that can be measured by performance reviews.
3. Implement training and development programs that are essential to sustaining high levels of productivity, by doing more with less, as indicated by a reduction in payroll.
4. Develop a health and safety program to limit liability.
5. Improve overall operations and increase employee retention.

6:00 PM – 8:00 PM

**Awards Ceremony and President's Reception**

Thursday, October 31, 2019

7:00 AM – 6:00 PM      **Registration Open – Attendees and Exhibitors**

7:30 AM – 10:30 AM      **T01. Breakfast with Keynote, General Business Meeting, and Candidates' Speeches**

**Keynote: Next Level Leadership**

Keynote Speaker: Ryan Estis

**.1 CEUs/1 contact hour**

This keynote prepares leaders to thrive in today's increasingly connected, competitive business environment. Ryan challenges conventional leadership practices and explores progressive techniques and technology that pace with the evolving needs of today's knowledge worker. As our workforce and customers evolve, the approach to effective leadership also needs to transform. Traditional command and control leadership is giving way to a more connected, collaborative and flexible approach to managing people and performance. This interactive keynote delivers new ideas, information and actionable insights that leaders can leverage immediately to drive productivity and performance. The outcome of this keynote will be leaders who are prepared to capture employee commitment, elevate productivity and performance and drive business growth. *Upon completion of this course, the participant should be able to:*

1. Articulate global workforce trends from our research portfolio.
2. Understand how leaders can embrace and lead change.
3. Discover four key leadership competencies for progressive leaders.
4. Describe case studies on how leading companies have built a winning work culture.

10:45 AM – 12:45 PM      **A03. Administrators Certificate Program: Business & Financial Management (Module 3 of 6)**

Christopher Albanese, PT, MS (Access Physical Therapy & Wellness)

Stephen Albanese, PT, DPT (Access Physical Therapy & Wellness)

**.2 CEUs/2 contact hours**

Management of finance and understanding business metrics in private practice is the foundation from which managers and owners are able to provide the resources necessary to maintain and grow the clinical operations of their practice. Poor financial management can lead to the demise of even the most visionary clinics, while even a basic foothold on the concepts of financial management can allow practices to remain in operation for many years. The concepts contained in this section pertain to the understanding of basic financial operations and metrics

found within private practice clinics, a prerequisite to the making of sound decisions.

*Upon completion of this course, the participant should be able to:*

1. Interpret common financial statements, including the balance sheet, income statement and statement of cash flows.
2. Analyze metrics used to manage the operations of a PT practice
3. Develop and manage a physical therapy practice budget.

11:00 AM – 12:30 PM **Concurrent Sessions**

**T02. Buzz Session: Telehealth and Physical Therapy: What PTs Practicing in the Telehealth Environment are Experiencing!**

Kelly Sanders, PT, DPT, ATC (Movement for Life, Inc)

Mark Milligan, PT, DPT (Anywhere Healthcare)

**0 CEUs/0 contact hours**

As the health care landscape in the United States evolves, telehealth is slowly becoming a more feasible practice option in physical therapy. Join us in this Buzz Session to hear from physical therapists working in telehealth who will share their background and answer your questions related to this new area of physical therapy.

**T03. Digital Marketing Strategies for the Modern PT Practice**

Scott Hebert, PT, DPT (WebPT)

Ryan Klepps, PT, DPT (WebPT)

**.15 CEUs/1.5 contact hours**

In the age of the patient-consumer, physical therapy practices can no longer afford to rely solely on physician referrals to support patient acquisition. Faced with increased financial responsibility, patients are taking their health care decisions into their own hands, and they're taking to the Internet to research their options. That means your practice needs to have not only a strong online presence, but also a solid plan for nurturing and converting potential new patients who find you online. In this session, you'll learn strategies for attracting potential patients to your online properties and then guiding those patients toward purchasing your services.

*Upon completion of this course, the participant should be able to:*

1. Design automated email marketing campaigns that help convert prospects into patients.
2. Identify three acquisition channels you can impact via digital marketing.
3. Describe the marketing funnel and how you can use it to improve patient acquisition efforts.

#### **T04. Emerging Issues Impacting the Private Practice Physical Therapist**

Rick Gawenda, PT (Gawenda Seminars & Consulting, Inc.)

Kara Gainer, JD (American Physical Therapy Association)

##### **.15 CEUs/1.5 contact hours**

This session will address Medicare and Medicare Advantage (MA) rules and regulations and prepare participants for upcoming payment and policy changes in this payment arena. Topics to be discussed include MA reimbursement policies for out-of-network providers; application of Medicare rules to MA plans; differences between prehab and rehab; Medicare's "8-Minute Rule" application to other Federal payers, Medicaid Fee-for-Service, and Medicaid Managed Care; 2020 changes regarding the PTA modifier and differential policy, Medicare's outpatient therapy threshold, TRICARE, and CPT coding; and ensuring compliance with the Qualified Medicare Beneficiary program.

*Upon completion of this course, the participant should be able to:*

1. Recognize the billing limitations on your practice when treating an out-of-network Medicare Advantage enrollee versus an in-network Medicare Advantage enrollee and how to ensure your practice remains in regulatory compliance.
2. Understand the prohibition of balance billing dually eligible Medicare beneficiaries in the Qualified Medicare Beneficiary program.
3. Identify 3 payment or policy changes occurring in 2020 that could have an impact on your practice.

#### **T05. Reducing the Risk of Malpractice for the PT Private Practice**

Jennifer Flynn, CPHRM (Aon/Affinity Insurance Services)

Stephanie (Lynn) Pierce, BSN, RN, CPHRM (CNA)

##### **.15 CEUs/1.5 contact hours**

The goal of this presentation is to make PT practice owners aware of the professional liability exposures they face in daily practice. Using the risk control recommendations presented, practice owners can immediately examine their current patient safety policies and incorporate recommended standards to increase positive patient outcomes and minimize liability exposure.

*Upon completion of this course, the participant should be able to:*

1. List the leading allegations made against PTs, PTAs, and PT Practices in malpractice lawsuits.
2. List the leading allegations made against PTs, PTAs, and PT Practices in License/Regulatory Board complaints.
3. Identify at least three risk management recommendations that PTs, PTAs, and PT Practices can incorporate into their practice.

### **T06. Unlock the Power of Outcomes!**

Stephen J. Hunter, PT, DPT (Intermountain Healthcare)

Mark Anderson, PT (MountainLand Rehabilitation)

Kennedy Hawkins, MBA, JD, LLM (PT Northwest)

#### **.15 CEUs/1.5 contact hours**

This interactive session will describe the expansive use of patient outcomes in clinical practice. Speakers will demonstrate how they use patient reported outcomes beyond the opportunity to receive additional payment based on value. Don't get us wrong, we all want to get paid more (and this session will discuss how to maximize MIPS bonus payments) but most practices have not used outcomes in many other areas. This session is not about theory, these 3 groups will share real and specific examples in the following areas: Engagement and retention of high-performing therapists; patient engagement to make greater clinical improvements and complete their episode of care; payer partnerships for innovative value-based payment models; evaluation of the effectiveness of continuing education; and measurement and reduction of unwanted variation in the care your therapists provide.

*Upon completion of this course, the participant should be able to:*

1. Maximize Medicare bonus payments with MIPS
2. Expand your vision in the use of patient outcomes
3. Solve business and clinical case examples in an interactive group session with real data

### **T07. Nutrition + PT: A Winning Combo for Your Patients and Profits**

Joe Tatta, PT, DPT, CNS (Integrative Pain Science Institute)

#### **.15 CEUs/1.5 contact hours**

The role of nutrition, the microbiome, and supplements are hot topics among patients and practitioners. Recognizing the heavy and growing burden of noncommunicable diseases and chronic pain syndromes, lifestyle interventions are becoming more popular and profitable. This breakout session will review the evidence on nutrition for pain, elaborate on scope of practice, and discuss new avenues of revenue for PT private practice.

*Upon completion of this course, the participant should be able to:*

1. Explain the effectiveness of nutrition interventions for people with chronic pain.
2. Discuss state and professional scope of practice laws governing nutrition.
3. Describe three ways to monetize nutrition in PT practice.

12:30 PM – 2:30 PM

**Lunch with Exhibitors**

12:30 PM – 6:00 PM

**Exhibit Hall Open**

1:30 PM – 4:00 PM

**A04. Administrators Certificate Program: Legal Compliance (Module 4 of 6)**

Paul J. Welk, PT, JD (Tucker Arensberg, P.C.)

**.25 CEUs/2.5 contact hours**

Legal compliance touches on numerous areas of private practice administration. The purpose of this session is to review certain legal compliance topics across a broad range of issues that affect private practices on a daily basis, paying particular attention to the areas of fraud and abuse, practice compliance plans, and the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"). Upon completion of this session, participants will be able to identify certain key legal compliance issues within physical therapy private practice so that these issues can be adequately addressed in a manner that supports an environment of compliance.

*Upon completion of this course, the participant should be able to:*

1. Demonstrate general understanding of HIPAA, HITECH Act, and HIPAA Omnibus Rule.
2. Demonstrate general understanding of fraud and abuse; review Stark, Anti-Kickback, and False Claims Act and basics of developing compliance plans.
3. Identify situations to avoid from a HIPAA and fraud and abuse perspective.

2:30 PM – 4:00 PM

**Concurrent Sessions**

**T08. Buzz Session: You Have Compliance Questions? We Have Answers!**

Nancy J. Beckley, MS, MBA, CHC (Nancy Beckley & Associates LLC)

Wade Meyer, PT, DPT, MJ, CHC (ATI Physical Therapy)

Mary Daulong, PT (Business & Clinical Management Services, Inc.)

**0 CEUs/0 contact hours**

A chance of a lifetime to get compliance questions answered. No questions? You might get an answer to problems you didn't know you had! Join three nationally recognized certified health care compliance experts and get your questions answered! From the consulting side, hear perils and pitfalls of not having a compliance program. From the provider side, hear "True Hollywood" stories from a therapy hotline for one of the largest therapy providers. Compliance problems are more than documentation, coding and billing! Think marketing, physician relationships, transportation, cash, delegation, supervision, loaning billing numbers, and HIPAA. You have compliance questions? We have answers!

**T09. Innovative Ways to Attract Your Ideal Patient Without Leaving Your Couch**

Jenna Kantor, PT, DPT (Jenna Kantor Physical Therapy PLLC)

Karen Litzy, PT, DPT (Karen Litzy Physical Therapy, PLLC)

**.15 CEUs/1.5 contact hours**

This breakout will be split into two 45-minute sections. Section one will teach the audience how to cultivate their content on social media. This will include lessons on how to do a facebook live session, schedule posts, message individuals, hold an engaging webinar, podcast, and repurpose content. Section two will teach the audience how to pitch to major media outlets. This will include how to structure your pitch, how to tailor your message to different media outlets (i.e. print media, tv, podcasts, blogs), and proper follow-up etiquette.

*Upon completion of this course, the participant should be able to:*

1. Develop a strategy to disseminate content on social media that will attract new patients.
2. Identify innovative ways they can reach their ideal patient.
3. Apply the information presented to create a pitch to a major media outlet.

#### **T10. Milliman Part 4: Analyze and Market Your Practice for Value-Based Care and APMs**

Holly Johnson, PT, DPT (Consultant)

Rick Katz, PT, DPT, MA (ATI Physical Therapy)

Kelly Sanders, PT, DPT, ATC (Movement for Life, Inc)

##### **.15 CEUs/1.5 contact hours**

The PPS Milliman Study is a powerful tool for analyzing and marketing your PT practice with new key practice indicators (KPIs). After gaining understanding of this one-of-a-kind actuarial study, learn how to apply key practice indicators to see how your practice stands up to these industry benchmarks. Learn how to make necessary changes to improve your practice and then market to your customers to participate successfully in alternative payment models for value-based care.

*Upon completion of this course, the participant should be able to:*

1. Define and explain value-based payment as well as varying determinates that drive value in PT care for payers.
2. Recognize what data to identify, monitor and analyze in your practices to determine practice health as well as performance in value-based care models.
3. Synthesize the Milliman 2 survey data for use in payer discussions as well as practice advocacy.

#### **T11. The Statistics and Metrics That Will Matter Most in 2020**

Brian J. Gallagher, PT (MEG Business Management)

##### **.15 CEUs/1.5 contact hours**

If you don't have a handle on the numbers of your business then you don't have a handle on your business. In all other industries, it is common to find SOP's (Standard Operating Procedures) which are created based on reliable results taken from the leading industry metrics. In this session, attendees will learn how

to create a company culture of a patient-centered practice that can carry itself based on objective measures that will bring high job satisfaction to all the team members. As we approach 2020 we need to create new practice dynamics based on performance.

*Upon completion of this course, the participant should be able to:*

1. List the key statistics for each position in a PT private practice and assign them to your staff appropriately.
2. Create your own Google Sheets document in order to efficiently track your practice statistics on a weekly basis.
3. Fill out a management action plan that when completed properly will always result in increased product attainment.

### **T12. Solving the Biggest Problem Plaguing Your Practice: Employee Fit**

Heidi Jannenga, PT, DPT, ATC (WebPT)

#### **.15 CEUs/1.5 contact hours**

The physical therapy industry is in a unique situation when it comes to hiring: unemployment rates are low; new PT grads have massive amounts of debt; and PT practices face increasingly complicated regulations, the pressure to consolidate, and decreasing payments from third-party payers. So, how do you remain competitive and attract top talent in such a market? You prioritize a value-driven, culture-based, people-first approach to hiring—and leading. In this session, Dr. Heidi Jannenga, PT, DPT, ATC, will explain conscious leadership and company culture; how to create well-defined company values; and hiring best practices to ensure mission alignment and company fit.

*Upon completion of this course, the participant should be able to:*

1. Describe conscious leadership and culture development as they relate to running a PT practice.
2. Prepare a plan for strengthening leadership and practice culture.
3. Apply strategies to enhance hiring processes and ensure better fit.

### **T13. Built to Sell: Demystifying Practice Value and the Sales Process**

Steve Stalzer, PT, MBA (8150 Advisors)

#### **.15 CEUs/1.5 contact hours**

Understanding the drivers of physical therapy practice value empowers clinic owners with the knowledge they need to create a sustainable and valuable practice. Owners who attend this session will leave with a working knowledge of how to calculate their practice value range. This presentation will also cover the risk factors that influence practice multiples and final value ranges. Owners who are interested in a future sale of their practice will also leave with an understanding of how to market their practice to potential buyers or investors.

*Upon completion of this course, the participant should be able to:*

1. Apply the process for calculating Adjusted EBITDA and practice value.
2. Drive value and mitigate risk in physical therapy practices.
3. Construct a deal book and apply key steps for selling a physical therapy practice.

4:00 PM – 6:00 PM      **Reception with Exhibitors**

Friday, November 1, 2019

7:00 AM – 6:00 PM      **Registration Open – Attendees and Exhibitors**

7:30 AM – 8:30 AM      **Vendor Presentations**

8:30 AM – 10:00 AM    **Breakfast with Exhibitors**

8:30 AM – 2:00 PM      **Exhibit Hall Open**

9:15 AM – 11:45 AM    **A05. Administrators Certificate Program: Marketing (Module 5 of 6)**  
Lynn A. Steffes, PT, DPT (Steffes & Associates Consulting Group)

**.25 CEUs/2.5 contact hours**

Marketing & Customer Service are key functions in a private practice clinic. Practice administrators have an outstanding opportunity to impact practice development & growth through marketing knowledge & skill development.

*Upon completion of this course, the participant should be able to:*

1. List their top 5 Target markets for marketing.
2. Describe 3-5 elements of their practice's Unique Sales Proposition.
3. List 5 elements of establishing a great first impression.
4. Outline 5 specific strategies for overcoming objections and managing patient arrival.
5. Create a 5-point plan for re-marketing patients & referral sources.

10:15 AM – 11:45 AM    **Concurrent Sessions**

**F01. Buzz Session: The Opportunity Upstream: Employers using therapy to get ahead of costs**

Mike Eisenhart, PT (Pro-Activity Central Enterprise, LLC)

Marc Rubenstein, PT, DPT (Jersey LiveWell)

Ashley Bacot (Rosen Hotels and Resorts)

Kenneth A. Aldridge, RN, BSN, MS-H.S.A. (Rosen Medical Center)

**0 CEUs/0 contact hours**

Innovation is not for the faint at heart...neither is shrinking reimbursement, competition from everywhere and the burden of paperwork. Practicing "Upstream" is neither technique nor tactic. It is not incremental or marginal. It is

fundamentally different; a strategy with significant opportunity which requires a shift in thinking and deployment of new skills. This session will facilitate the shift using a well-documented case example and collaboration to analyze how one business made it happen. Featuring special guests, Ashley Bacot and Kenneth Aldridge of the Rosen Hotel Team. Join us for a unique opportunity to gain an outside perspective from industry leaders.

**F02. Marketing Bench Marking: Using Data to Maximize Profits**

Michelle E. Collie, PT, DPT, MS (Performance Physical Therapy)

Darren Rodia, PT, DPT, MS (Kinetic Physical Therapy)

Scott Wick (Therapeutic Associates, Inc.)

**.15 CEUs/1.5 contact hours**

Why did this patient come to your practice? An accurate answer to this question provides access to valuable data that can be used to measure the effectiveness, and return-on-investment of marketing initiatives. This course will begin with the *Why*: why it's important to collect the data. Next, we will introduce a categorization system developed to help practices gather useful data, including best practices for gathering this information. Finally, we will provide examples of how this data can drive successful marketing initiatives.

*Upon completion of this course, the participant should be able to:*

1. Understand and be able to use this PPS-developed system to categorize new patients, based on primary and secondary influencers.
2. Implement a system, to accurately collect data on new patients.
3. Measure the return on investment for specific marketing initiatives.

**F03. Employee Empowerment: Breaking Down Barriers To Optimize Productivity!**

Brandon Seigel (Wellness Works Management Partners)

**.15 CEUs/1.5 contact hours**

In 2018, the Bureau of National Affairs reported that 11 billion dollars are lost annually due to employee turnover. According to APTA's Workforce Data, the industry is on track to have a shortage of 26,560 Physical Therapists by 2025 which is only six years away. Private practices are experiencing unwanted trends in employee morale; voluntary employee turnover; reported mistakes; and lawsuits. This workshop is designed to introduce leading strategies in the field of employee engagement and employee empowerment to help break down barriers and optimize productivity in a private practice.

*Upon completion of this course, the participant should be able to:*

1. Identify strategies for solving employee performance problems through employee empowerment techniques.

2. Create a roadmap for success to hold your team more accountable without burning them out.
3. Identify strategies to align employees' personal and professional goals with key performance indicators for your private practice.

#### **F04. Does Your Practice Need an Eval? Using Your Diagnostic Skills to Evaluate Your Clinic**

Christopher Albanese, PT, MS (Access Physical Therapy & Wellness)

Stephen Albanese, PT, DPT (Access Physical Therapy & Wellness)

##### **.15 CEUs/1.5 contact hours**

You would never treat a patient without an evaluation, but have you thought about doing an evaluation for your practice? If your business is not functioning at its highest level, using a systematic approach and analyzing your practice's data can help you objectively evaluate your practice. This session will provide tools to evaluate and diagnose your key business problems. You'll assess its performance and set specific, measurable goals. Based on your evaluation, you'll develop a personalized treatment plan. A well-functioning business can only lead to happy staff and patients, which should be the goal of every private practice owner.

*Upon completion of this course, the participant should be able to:*

1. Define the terms "Key Performance Indicator" and "Benchmark Data" and describe five specific examples of KPIs that are especially relevant to private practice.
2. Compare your clinic's data to key private practice benchmark data and assess if you are above or below typical benchmarks for a practice of your size and geography.
3. Perform an evaluation of key business metrics for your clinic, assess key problems, write functional goals, and develop a treatment plan for your practice.

#### **F05. How to Slash Drop-offs to Improve Your Bottom Line: Three Strategies**

Heather Chavin, MA (CareConnections Outcomes System)

Susan C. Clinton, PT, DScPT (Embodiment Physiotherapy & Wellness, LLC)

##### **.15 CEUs/1.5 contact hours**

This highly interactive presentation uses concepts from health and psychological research to identify specific behaviors you can incorporate to engage your clients in their home programs and facilitate higher rates for completed plans of care. A completed plan of care means fewer cancellations, a lower vacancy rate, and greater patient satisfaction for advertising for your clinic and for the profession. You will immediately experiment with recommendations in group activities, discussions and interactive quizzing software. We will provide checklists for implementation and resources for training staff to formulate an implementation plan. Tools and apps will be offered as well as metrics to measure success.

*Upon completion of this course, the participant should be able to:*

1. Integrate three aspects of Motivational Interviewing based on the patient's readiness to change per the Transtheoretical Model of Behavior Change, including overcoming barriers to engage fully in their program.
2. Evaluate the patient/client locus of control based on verbal and non-verbal cues to design an appropriate home program at each step in the plan of care.
3. Formulate 2 methods to promote successful habit establishment around practice management of the client's home program.

#### **F06. Leveraging Estate Planning to Maximize Your Wealth**

Nora Gieg Chatha, JD (Tucker Arensberg, P.C.)

Barbara Malm, MBA (Foundation for Physical Therapy Research)

Tammy Neel Pessmeg, CPA, MST (CliftonLarsonAllen LLP)

#### **.15 CEUs/1.5 contact hours**

Our panel of legal, financial, and philanthropic professionals will discuss fundamental estate planning considerations for PT practice owners in order to ensure that they have a viable plan for retirement, sale and continued operation in the event of incapacity. This session will emphasize the importance of having a comprehensive estate plan in place and will cover common planning considerations, with an emphasis on planning strategies to ease the burden of exiting a business or that maximize assets while minimizing tax burden. The session will also include a review of income and death tax implications, and charitable planning.

*Upon completion of this course, the participant should be able to:*

1. Understand legal and tax aspects of philanthropic gifts.
2. Recognize the value of creating an estate plan to meet your family and business goals.
3. Learn how to integrate blended gift planning options for practice owners who are ready to sell their business.

12:00 PM – 2:00 PM

**Lunch with Exhibitors**

2:00 PM – 5:00 PM

**A06. Administrators Certificate Program: Billing and Coding (Module 6 of 6)**

Rick Gawenda, PT (Gawenda Seminars & Consulting, Inc.)

#### **.3 CEUs/3 contact hours**

This session will get participants ready for providing outpatient therapy services in calendar year 2020. Topics will include, but will not be limited to: new, revised, and deleted CPT codes; therapy threshold dollar amount; TRICARE update; and new PTA and OTA modifiers. In addition, this session will provide answers to commonly asked questions about Medicare Advantage plans, whether in-network or out-of-network, the prohibition of balance billing dually eligible Medicare beneficiaries in the Qualified Medicare Beneficiary program, and teach

participants the time-frame for the implementation of the new Medicare cards and use of the Medicare Beneficiary Identifier.

*Upon completion of this course, the participant should be able to:*

1. Verbalize 3 differences between traditional Medicare and Medicare Advantage as they pertain to physical therapy services.
2. Recite when the physical therapist assistant modifier will be required to be appended to CPT codes on the claim form.
3. Define what interventions are included within each CPT code commonly used by the physical therapy profession.

2:00 PM – 3:30 PM

### **Concurrent Sessions**

#### **F07. Buzz Session: The Wellness Puzzle: Where Do Physical Therapists Fit?**

Patrice Hazan, PT, DPT, MA (GroupHab Physical Therapy)

Charlotte Walter, PT, DPT (GroupHab Physical Therapy)

#### **0 CEUs/0 contact hours**

Health care is transforming from reactive to proactive with an emphasis on health promotion, wellness, and prevention. This change has left many PTs unsure how we fit. Join this open discussion to learn from other PTs how they have successfully moved into the health promotion and prevention arena. Discover how a wellness revolution can include alternative models of PT treatment that create long-term solutions. Leave with an understanding how to include wellness interventions within our current medical system. Join us and change the way you think about physical therapy!

#### **F08. The New Way of Marketing: Get More New Patients From the Same Number of Calls**

Rick Lau, Bsc Engineering (Principal)

#### **.15 CEUs/1.5 contact hours**

Patients now have more options for care than ever before. In order to have a successful physical therapy practice in 2019 and beyond, you have to stop doing marketing the “Old Way.” Instead of throwing more money into marketing and constantly changing digital advertising, focus on converting the patients who are already calling you. The “New Way” of marketing uses the latest technology to measure and maximize the patient experience through each step of your patient funnel: from the moment they land on your website; to calling your clinic; to booking their plan of care.

*Upon completion of this course, the participant should be able to:*

1. Describe the new patient funnel from the moment they land on your website to calling your clinic, and booking a plan of care.
2. Distinguish the “old way” and the “new way” of doing marketing that uses technology to measure patient experience metrics in each step in your new patient funnel.
3. Develop and analyze the tasks that need to be completed or owned by management and the front desk staff.

#### **F09. Putting your KPI's to Work for You**

Mike Horsfield, PT, MBA (Rock Valley Physical Therapy)

Mike Osler, PT, DPT (Rock Valley Physical Therapy)

##### **.15 CEUs/1.5 contact hours**

In this session we will share the aggregate and regional data from the PPS Key Performance Indicator Benchmarking Study and show how small changes in certain key performance indicators (KPIs) can cause a dramatic improvement in company performance. Come to this session to learn more about this important tool for measuring and building your practice. Those who submitted data via the PPS KPI project will be asked to bring their reports to the session, and those who have not participated have the opportunity to learn what it's all about. After a 30-45 minute presentation in large group, attendees will be broken up into smaller groups with a table leader who will facilitate a small group discussion on how to identify and quantify the opportunities for improvement.

*Upon completion of this course, the participant should be able to:*

1. Identify how key performance indicators (KPIs) drive the financial success of their businesses.
2. Analyze their KPIs and identify opportunities for improvement.
3. Quantify the financial implications of changes to their KPIs.
4. Outline different models for implementing successful change.

#### **F10. Are Your Managers Killing Your Company Culture?**

Brian Hartz, PT, DPT (HARTZ Physical Therapy)

##### **.15 CEUs/1.5 contact hours**

As practice owners, we know we can't do it all. We started in private practice because we are passionate about what we do and confident that we can provide a great service to our patients. The mission and culture of the practice start from the top, but how do we ensure that these values filter down through the ranks to each employee? If you have ever wondered if there is a disconnect between your vision as owner of the business and the implementation of that vision throughout the entire practice, you should attend this course. Remember, employees leave MANAGERS not companies!

*Upon completion of this course, the participant should be able to:*

1. Identify the limitations of popular management models.
2. Identify the role managers play in building company culture.
3. Understand best practices for implementing management coaching to increase performance and to drive employee engagement.

**F11. Telehealth: Payment and Practice Considerations**

Kelly Sanders, PT, DPT, ATC (Movement for Life, Inc)

**.15 CEUs/1.5 contact hours**

As the health care landscape in the United States evolves, telehealth is rapidly becoming a feasible practice option for physical therapy providers and third-party payers. Physical therapists considering entering this practice arena need to educate themselves on the governing regulatory and payment constraints inherent to this practice realm. This presentation will provide an overview of the current environment of telehealth related to payment, licensure and practice. Practical ways to begin a telehealth program in this evolving landscape will be discussed.

*Upon completion of this course, the participant should be able to:*

1. Describe the physical therapy licensure regulations impacting the practice of telehealth.
2. Define payment polices, billing codes and modifiers required to accurately describe telehealth services for federal and commercial insurance payers.
3. Discuss how private practice has incorporated telehealth into the management of musculoskeletal conditions.
4. Identify opportunities as well as challenges for physical therapists practicing in telehealth.

**F12. The Negotiation Hack! Negotiation Techniques and Strategies for Private Practice PTs**

Biagio Mazza, PT, DPT (Elite Sports Medicine & Physical Therapy)

**.15 CEUs/1.5 contact hours**

A patient asks to you to, "Give me a deal," on their \$3000 bill that got recently denied by insurance... One of your key staff members asks for a \$10,000 per year raise to match an offer they have just been given from another company... A vendor you love to work with increases your costs by 25%... Your 6-year-old wants to stay up late to watch TV... Like it or not, you are negotiating every day. This course will teach you proven, ethical strategies to focus the conversation and give you an advantage in any negotiation.

*Upon completion of this course, the participant should be able to:*

1. Describe the history and development of negotiation strategy up to current concepts in the field.
2. Define the steps that every successful negotiation process must go through.
3. List at least 1 negotiation "gambit" for beginning, middle, and end stage negotiations.

3:45 PM – 5:15 PM

### **Concurrent Sessions**

#### **F13. Buzz Session: Alternative Employee Compensation Models. What Works, and What Doesn't**

Jason M. Wambold, MSPT (OnusOne, by Pay for Performance Solutions, LLC)

Ronald A. Cram, PT (Rehab Strategies)

Jason Lobb, PT, MPT (Mountain Land Rehabilitation)

#### **0 CEUs/0 contact hours**

Today's workforce carries an unprecedented debt load, demands higher salaries, and cites "work/life" balance as a top indicator of career satisfaction. As reimbursement declines, this scenario is unsustainable. This discussion will present new, innovative concepts in compensation models. Topics covered will include: shared risk compensation models vs traditional bonus models; optional vs mandatory enrollment; experience-based models vs reimbursement-based models; revenue-based models vs volume-based models; units of production (patients, units, minutes...); offering multiple plan tiers with relative risk; and new grads and compensation models. Through an open forum, participants will be encouraged to share what types of models they have used in their practices.

#### **F14. The State of Direct Access Marketing: What Works In Today's Private Practice Market**

Chad Madden, PT, MSPT (Madden Physical Therapy)

#### **.15 CEUs/1.5 contact hours**

In this presentation, you'll learn how to evolve your direct access marketing efforts to meet today's changing trends—and continue to expand your client base. You'll master seven strategic marketing systems designed to attract new patients, encourage referrals from physicians and past patients, and ensure each patient completes their full plan of care. You'll learn current, best practices for marketing online and discover the reasons and remedies for direct access marketing failure. You'll leave the presentation with a new 12-month marketing plan in hand, designed to predictably attract direct access patients regardless of competition and declining referrals.

*Upon completion of this course, the participant should be able to:*

1. Differentiate between the old model and the new model of patient attraction, and summarize the reasons for shifting marketing efforts directly to the consumer.
2. Identify, illustrate, and reproduce seven, key marketing systems critical for sustaining growth in a direct access-minded clinic.
3. Design a 12-month marketing plan designed to shift the new patient sources towards direct access.

### **F15. Why More PT Owners Are Choosing The Hybrid Model**

Brian J. Gallagher, PT (MEG Business Management)

#### **.15 CEUs/1.5 contact hours**

It's time that we take back control over our future and drive the narrative instead of leaving it to the insurance companies. A purely cash-based practice is challenging, due to lower patient volume, increased pressure on sales, and difficulty maintaining work-life balance. The fact is, we don't all live in an affluent county that will support an all-cash practice. Come learn how you can set up a hybrid model and have the best of both worlds.

*Upon completion of this course, the participant should be able to:*

1. Evaluate if your particular office is well suited for establishing the hybrid practice model.
2. Apply the standard operating procedures necessary to comply with the hybrid practice model.
3. Assess the financial impact on your practice when running the hybrid practice model.
4. Explain the pros and cons associated with converting over to the hybrid practice model.

### **F16. Creating a Win-Win: The Use of 'Job Scorecards' to Keep Employees Motivated and On Task**

Kyle Krupa, PT, DPT (Athletix Rehab and Recovery)

#### **.15 CEUs/1.5 contact hours**

Aligning employee performance with company goals can be a challenging task. Are you having difficulty keeping employees motivated? Are your performance metrics phrased in a way to incite action and prevent the 'clock-in, clock-out' mentality? Do your employees understand how to exceed expectations? This course will prepare practice owners for thoughtful design and integration of the 'Job Scorecard'. Grounded on your company ethos, the Scorecard provides direction and benchmarks for employees. Learn to set expectations, accountability, and a reward system that aligns individual development with company goals. This tool also provides justification for bonus, merits, promotions, or termination when necessary.

*Upon completion of this course, the participant should be able to:*

1. Align employee accountabilities and desired outcomes to the company's ethos
2. Develop a Job Scorecard to convey concise expectations across each position within the company
3. Integrate the Job Scorecard into the hiring process and performance appraisals that may warrant bonus, merit increase, promotion or termination.

**F17. Electronic Communication - How to Connect & Stay Compliant with Patients and Practitioners**

Mary Daulong, PT (Business & Clinical Management Services, Inc.)

Teresa Daulong, LSSGB, CHSP, CHTP, CEAP, CHSRAP (Business & Clinical Management Services, Inc.)

**.15 CEUs/1.5 contact hours**

This course will answer the question, "Is encryption required when transmitting e-PHI?" It will also provide guidance on compliant electronic communication between your practice and your patients, doctors, etc. The speakers will address key points in HIPAA's Security Rule and will demonstrate how to text, email, and distribute other electronic communications while remaining compliant. Reporting Breaches and Security Incidents will also be covered. Participants will be provided with content for several required Policies and Procedures and a Security Risk Analysis Instrument.

*Upon completion of this course, the participant should be able to:*

1. Distinguish between compliant and non-compliant types of communication.
2. Identify key rules and regulations that must be followed.
3. Develop a compliant communication plan for your practice.

7:00 PM – 10:00 PM **Closing Celebration**

**Saturday, November 2, 2019**

7:00 AM – 10:00 AM **Registration Open – Attendees and Exhibitors**

8:00 AM – 9:00 AM **Solution Rooms**

**0 CEUs/0 contact hours**

PPS Solution Rooms provide an opportunity to network with colleagues and participate in a discussion on a specific issue. Designed to be free-flowing, small-group discussions, solution rooms are your chance to make new contacts, get answers or new ideas, and share your own experience. Come join the discussion!

9:15 AM – 11:00 AM **S01. Closing Breakfast with Keynote: Customer Experience is the New Competitive Advantage - What Works, What Doesn't and Why it Matters More**

## Than Ever

Keynote Speaker: David Avrin

### .1 CEUs/1 contact hour

You've done customer service. You know customer service. But there is tremendous new learning on the profound importance of how your customers—your patients and their families—EXPERIENCE doing business with you at every point of contact. In fact, it is their perception of that experience that can make or break your patient conversion and retention. In this keynote presentation, David Avrin delivers profound, actionable content, but with great sensitivity, humor and energy. He is the author of three books including the upcoming: *Why Customers Leave (and How to Win Them Back)* and has a powerful and timely message for organizations across America and around the world.

*Upon completion of this course, the participant should be able to:*

1. Recognize the changing business landscape and understand how new communication mechanisms carry both promise and danger.
2. Understand in greater depth, the “buying” decision-making process regarding accessing health services so that professionals can align their policy strategy to that of their clients/patients.
3. Understand their prospective clients/patients beyond demographic and psychographics to effectively align messaging and interactivity.
4. Outline the client/patient path along the service continuum and identify points of frustration, delay or misalignment that might cause patients to seek other providers.

