

Physician-Focused Payment Model Technical Advisory Committee

June 12-13, 2023 – PTAC Public Meeting

Improving Management of Care Transitions in Population-Based Models

Presenter and Panelist Biographies

Panel Discussion 1

(Monday, June 12, 10:40 a.m. – 12:10 p.m. EDT)

Subject Matter Experts

- [**Scott A. Berkowitz, MD, MBA**](#), Chief Population Health Officer and Vice President, Johns Hopkins Medicine; and Associate Professor of Medicine, Division of Cardiology, Johns Hopkins University School of Medicine
- [**Karen S. Johnson, PhD**](#), Vice President, Practice Advancement, American Academy of Family Physicians (AAFP) (*Previous Submitter – APC-APM proposal*)
- [**Robert A. Zorowitz, MD, MBA**](#), Regional Vice President, Health Services for the Northeast, Humana

Listening Session 1

(Monday, June 12, 1:10 – 2:40 p.m. EDT)

Subject Matter Experts

- [**Cheri A. Lattimer, RN, BSN**](#), Executive Director, National Transitions of Care Coalition
- [**Diane E. Meier, MD, FACP**](#), Founder, Director Emerita and Strategic Medical Advisor, Center to Advance Palliative Care
- [**Diane Sanders-Cepeda, DO, CMD**](#), Senior Medical Director, UnitedHealthcare Retiree Solutions

Panel Discussion 2

(Monday, June 12, 2:50 – 4:20 p.m. EDT)

Subject Matter Experts

- [**Charles Crecelius, MD, PhD**](#), Medical Director for Post-Acute Care, BJC Medical Group
- [**David C. Herman, MD**](#), Chief Executive Officer, Essentia Health
- [**Jenny Reed, MSW**](#), Senior Vice President, Value-based Care, Baylor Scott & White Health
- [**Robert M. Wachter, MD**](#), Professor and Chair, Department of Medicine, University of California, San Francisco (UCSF)

Listening Session 2

(Tuesday, June 13, 9:10 – 10:40 a.m. EDT)

Subject Matter Experts

- [**Richard J. Gilfillan, MD, MBA**](#), Former President, Trinity Health and Geisinger Health Plan, and Director, Center for Medicare and Medicaid Innovation (Retired)
- [**Mary D. Naylor, PhD, RN**](#), Marian S. Ware Professor, Gerontology, School of Nursing, and Director, NewCourtland Center for Transitions and Health, Penn Nursing, University of Pennsylvania
- [**Grace Terrell, MD, MMM**](#), Chief Product Officer, IKS Health

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Listening Session 3

(Tuesday, June 13, 10:50 a.m. – 12:20 p.m. EDT)

Subject Matter Experts

- [John Birkmeyer, MD](#), President, Sound Physicians
- [Marc Rothman, MD, CMD](#), Chief Medical Officer, Signify Health
- [Lewis G. Sandy, MD, FACP](#), Co-Founder, SuLu Consulting LLC (former SVP, Clinical Advancement, UnitedHealth Group)

Panel Discussion 1: Biographies

(June 12, 10:40 a.m. – 12:10 p.m. EDT)

Subject Matter Experts

[Scott Berkowitz, MD, MBA](#), Johns Hopkins Medicine



Dr. Scott Adam Berkowitz is Chief Population Health Officer and Vice President of Population Health for Johns Hopkins Medicine (JHM), headquartered in Baltimore, Maryland. Dr. Berkowitz leads and provides strategic direction for the population health portfolio across the JHM enterprise. Dr. Berkowitz is also Associate Professor of Cardiology at the Johns Hopkins University School of Medicine, and a practicing general cardiologist. Since 2011, Dr. Berkowitz has held positions at JHM focused on leading accountable care and population health efforts. As the Chief Population Health Officer, he leads efforts to advance population health initiatives across JHM to improve health for high-risk patients to improve health outcomes and promote health equity.

Dr. Berkowitz previously served as Senior Medical Director for Accountable Care within the Office of Johns Hopkins Physicians and served as the Executive Director of Johns Hopkins Medicine Alliance for Patients, the Johns Hopkins Medicine Accountable Care Organization and Care Transformation Organization through the Maryland Primary Care Program. From 2012-2016, he served as the Program Administrator and a Project Director for the Johns Hopkins Community Health Partnership (J-CHiP). Dr. Berkowitz has held numerous positions in federal and state government, including as a fellow in the U.S. Senate Finance Committee during the passage of the Affordable Care Act; on the Senate Health, Education, Labor and Pensions Committee during Medicare Part D legislation; and as a senior health care policy development adviser to the governor of Illinois. Dr. Berkowitz received his bachelor's degree in biology, master's degree in business administration and medical degree from Yale University. He completed his internal medicine residency and cardiovascular disease fellowship training as well as a geriatrics research fellowship at Johns Hopkins University School of Medicine.

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Panel Discussion 1: Biographies (Continued) (June 12, 10:40 a.m. – 12:10 p.m. EDT)

Subject Matter Experts

Karen S. Johnson, PhD, American Academy of Family Physicians (AAFP)
(APC-APM proposal)



Dr. Karen Johnson is an accomplished leader with experience that spans traditional health care boundaries having worked with employers, plans, providers, and health systems over her 30+ year career. Understanding each of these unique perspectives fuels her work as a translator, bridge-builder, and change agent. Her long-standing personal mission is to make health care work better for more people at a cost they can afford. Ensuring that primary care is adequately funded, appropriately evaluated, and connected to the broader health care ecosystem in a patient-centered manner has been the central focus of these efforts for many years.

In her role at the American Academy of Family Physicians, Dr. Johnson's teams include the Center for Payment Innovation focused on moving primary care payment toward appropriately funded, prospective models and the Center for Career and Practice with the mission of equipping family physicians to enjoy successful careers in a variety of practice settings and roles.

Robert A. Zorowitz, MD, MBA, Humana

Dr. Robert Zorowitz is Regional Vice President, Health Services, for the Northeast Region of Humana. He is a graduate of Albany Medical College, completed his residency in internal medicine at Long Island Jewish Medical Center, in New York and after two years in the National Health Service Corps, completed his fellowship in geriatric medicine at Mount Sinai Medical Center in New York City. He completed his Masters in Business Administration at the Goizueta Business School of Emory University.

Dr. Zorowitz is certified by the American Board of Internal Medicine in Internal Medicine, Geriatric Medicine and Hospice/Palliative Medicine. Prior to his current position, he was Senior Medical Director for Optum, overseeing its institutional special needs plans in downstate New York. Prior to that, Dr. Zorowitz practiced clinical geriatrics in a variety of settings, including office, hospital, and nursing home. Among his other activities, he has been the advisor for the American Geriatrics Society to the American Medical Association (AMA) Current Procedural Terminology (CPT) Editorial Panel for nearly 20 years.



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Listening Session 1: Biographies (June 12, 1:10 – 2:40 p.m. EDT)

Subject Matter Experts

Cheri A. Lattimer, RN, BSN, National Transitions of Care Coalition

Ms. Cheri Lattimer serves as the Executive Director for the National Transitions of Care Coalition (NTOCC) and President/CEO of Integrity Advocacy & Management. Her leadership in quality improvement, case management, integrated health care, care coordination, and transitions of care is known on the national and international landscape. Ms. Lattimer is affiliated with various professional organizations and maintains active roles on several national boards and committees including the Utilization Review Accreditation Commission's (URAC's) Health Standards Committee, CMS Caregiver Workgroup, CMS Advisory Committee for Education and Outreach, the American Board of Quality Assurance and Utilization Review Physicians (ABQAURP) Board of Directors and ABQAURP Continuing Medical Education (CME) Committee.



Diane E. Meier, MD, FACP, Center to Advance Palliative Care



Dr. Diane Meier is immediate past CEO of the Center to Advance Palliative Care (CAPC), a national organization devoted to increasing access to quality palliative care for people living with a serious illness and their families in the United States. Under her leadership the number of palliative care programs in U.S. hospitals has more than tripled in the last 10 years. Dr. Meier is Co-Director of the Patty and Jay Baker National Palliative Care Center; Professor of Geriatrics and Palliative Medicine; Professor of Medicine; Catherine Gaisman Professor of Medical Ethics; and was the founder and Director of the Hertzberg Palliative Care Institute, 1997-2011, all at the Icahn School of Medicine at Mount Sinai in New York City.

Dr. Meier was named one of 20 People Who Make Healthcare Better in the U.S. by HealthLeaders Media 2010, and was elected to the National Academy of Medicine of the National Academy of Sciences in 2013. She received the Gustav O. Lienhard Award of the National Academy of Medicine and the AHA-HRET TRUST Award, both in 2017, as well as a MacArthur Foundation Fellowship in 2008. Dr. Meier served as a Health and Aging Policy Fellow in Washington DC in 2009-2010, working both on the Senate's Health, Education, Labor, and Pensions (HELP) Committee and at the Department of Health and Human Services. Dr. Meier has over 200 peer-reviewed publications in the medical literature. Her most recent book, *Meeting the Needs of Older Adults with Serious Illness: Challenges and Opportunities in the Age of Health Reform*, was published in 2014.

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Listening Session 1: Biographies *(Continued)* (June 12, 1:10 – 2:40 p.m. EDT)

Subject Matter Experts

Diane Sanders-Cepeda, DO, CMD, UnitedHealthcare Retiree Solutions

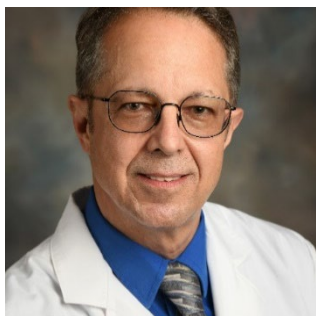
Dr. Diane Sanders-Cepeda is a Senior Medical Director for UnitedHealthcare Retiree Solutions. She is responsible for clinical strategy, quality improvement, clinical program development, and innovation. Dr. Sanders-Cepeda has expertise in behavioral health solutions, social determinants of health integration into clinical models, post-acute and long-term care medical management and system development, and hospice and palliative care models. She works collaboratively with employers and plan sponsor groups nationally to address quality, affordability, and care delivery for their retirees. Dr. Sanders-Cepeda is a Geriatrician and Certified Medical Director who has focused her career on geriatric care across the post-acute and long-term care continuum. Her passion for program development and the practical application of medical models led her to starting her own medical practice which focused on geriatric medical care, resource management, and transitions of care across the post-acute and long-term care continuum. As Dr. Sanders-Cepeda grew her practice, her expertise in geriatric medicine led her to create an inpatient geriatric care unit at South Florida Hospital, develop palliative care initiatives for home health and skilled nursing facilities (SNFs), and serve in the capacity of physician advisor and Medical Director for multiple SNFs, inpatient units, and hospice groups. Dr. Sanders-Cepeda then transitioned into United Health Group as an Optum Medical Director for the South Florida Market. She is an active member of the American Medical Directors Association (AMDA), serving on AMDA's Board of Directors and as the chair of AMDA's Online Education Subcommittee. On the state level, Dr. Sanders-Cepeda remains an active member of the Florida Medical Directors Association (FMDA) and serves as the President of the organization and as the chair of FMDA's Journal Club.



Panel Discussion 2: Biographies (June 12, 2:50 – 4:20 p.m. EDT)

Subject Matter Experts

Charles Crecelius, MD, PhD, BJC Medical Group



Dr. Charles Crecelius is the Medical Director, Post-Acute Care Services for the BJC Medical Group, a multi-facility medical director for Delmar Gardens Enterprises, and Associate Clinical Professor of Internal Medicine and Geriatrics at Washington University School of Medicine. He is a Past-President of the Society for Post-Acute and Long-Term Care Medicine, and was their Medical Director of the Year in 2019. He helped found and is the current moderator for the St. Louis Post-Acute and Long-Term Care Roundtable, a group consisting of the four area hospital service organizations, major nursing homes, physicians and quality improvement organizations to help standardize processes involving transitions of care and best clinical outcomes. He has 35 years of clinical experience in the office, hospital and nursing home setting prior to his current administrative role, and has worked on numerous state and national quality improvement programs.

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Panel Discussion 2: Biographies (Continued) (June 12, 2:50 – 4:20 p.m. EDT)

Subject Matter Experts

David C. Herman, MD, Essentia Health

Dr. David Herman serves as Chief Executive Officer for Essentia Health, an integrated health system headquartered in Duluth, Minnesota. Dr. Herman oversees 77 clinics, 14 hospitals, and 15,000 employees who care for patients in Minnesota, Wisconsin and North Dakota. He is committed to upholding the organization's values of quality, hospitality, respect, joy, justice, stewardship, and teamwork. Dr. Herman received his medical degree from Mayo Medical School in Rochester, Minnesota, and completed his residency in ophthalmology at Mayo School of Graduate Medical Education. Dr. Herman was a senior staff fellow in ocular immunology and uveitis at the National Eye Institute, part of the National Institutes of Health in Bethesda, Maryland. He received a master's degree in medical management from the University of Texas at Dallas. Dr. Herman served on the Mayo Clinic staff from 1988 to 2011, where he was a professor of ophthalmology with more than 90 peer-reviewed publications. Dr. Herman was also chair of the Clinical Practice Committee at the Mayo Clinic in Rochester, a member of the Rochester Executive Board, a member of the board of directors for Mayo Clinic Health System, and a member of the Mayo Clinic Management Team. Following his time at Mayo, Dr. Herman became CEO of Vidant Health in eastern North Carolina. He joined Essentia Health in January 2015. Dr. Herman currently serves on the board of trustees of Ronald McDonald House Charities; the board of trustees of The College of St. Scholastica; the board of trustees of the Minnesota Hospital Association; the board of trustees of the American Academy of Ophthalmology; the American Hospital Association Regional Policy Board 6; and the American Cancer Society.



Jenny Reed, MSW, Senior Vice President, Value-based Care, Baylor Scott & White Health



Ms. Jenny Reed is the Senior Vice President of Value-based Care for Baylor Scott & White Health (BSWH), the largest not-for-profit health system in Texas. She also serves as executive administrator for the Baylor Scott & White Quality Alliance (BSWQA), BSWH's clinically integrated network and accountable care organization. Ms. Reed's background in social work and care management brings a unique perspective to guide strategy and leadership to BSWH's value-based care initiatives as well as the comprehensive care management, post-acute, and value-based government programs. As the leader of the BSWQA's senior leadership team, Ms. Reed guides the strategy development, long- and short-term goals, and overall alignment and organizational initiatives. Under her leadership, BSWQA ranked in the top 10 ACOs for the Medicare Shared Savings Program for the past three years, earning \$39 million in 2018, \$68 million in 2019 and \$96 million in 2020, and \$124.5 million in 2021—the highest savings in the nation for the second year in a row. Ms. Reed also leads the development and integration of the Value-based Care unit within BSWH, created to shift health care from volume to value-focused. Ms. Reed directs vital elements of value-based care—she guides the strategy in developing programs and initiatives that support BSWH's ambition to be the trusted leader, educator, and innovator in value-based care delivery, customer experience, and affordability. Ms. Reed is a Louisiana native who earned her Bachelor of Science degree from the University of Louisiana at Lafayette and holds a Master of Social Work from Louisiana State University.

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Panel Discussion 2: Biographies (Continued) (June 12, 2:50 – 4:20 p.m. EDT)

Subject Matter Experts

Robert M. Wachter, MD, University of California, San Francisco (UCSF)

Dr. Robert Wachter is Professor and Chair of the Department of Medicine at the University of California, San Francisco. Author of 300 articles and 6 books, Wachter coined the term “hospitalist” in 1996 and is often considered the “father” of the hospitalist field, the fastest growing specialty in the history of modern medicine.



Dr. Wachter is past president of the Society of Hospital Medicine, past chair of the American Board of Internal Medicine, and an elected member of the National Academy of Medicine. In 2015, *Modern Healthcare* magazine ranked him as the most influential physician-executive in the U.S. Dr. Wachter’s 2015 book, *The Digital Doctor: Hope, Hype and Harm at the Dawn of Medicine’s Computer Age*, was a New York Times science bestseller. In 2020-23, Dr. Wachter’s tweets on Covid-19 were viewed more than 500 million times by 275,000 followers and served as a trusted source of information on the clinical, public health, and policy issues surrounding the pandemic.

Listening Session 2: Biographies (June 13, 9:10 – 10:40 a.m. EDT)

Subject Matter Experts

Richard J. Gilfillan, MD, MBA, Center for Medicare and Medicaid Innovation (Retired)



Richard “Rick” Gilfillan currently is an independent consultant and volunteer working with non-profit organizations seeking to create accountable high value health care. Previously he was the Chief Executive Officer (CEO) of Trinity Health, a \$19 billion Catholic health system that serves communities in 22 states from 2013 to 2019.

Prior to that, Dr. Gilfillan was the first Director of the Center for Medicare and Medicaid Innovation (CMMI) at CMS from 2010 to 2013. Prior to his appointment at CMMI, Dr. Gilfillan was President and CEO of Geisinger Health Plan and Executive Vice President of insurance operations for Geisinger Health System. He has also served as the Senior Vice President for national network management at Coventry Health Care and as the Chief Medical Officer for Independence Blue Cross.

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Listening Session 2: Biographies (Continued)
(June 13, 9:10 – 10:40 a.m. EDT)

Subject Matter Experts

Mary D. Naylor, PhD, RN, University of Pennsylvania School of Nursing

Dr. Mary Naylor is the Marian S. Ware Professor in Gerontology and Director of the NewCourtland Center for Transitions and Health at the University of Pennsylvania School of Nursing. For more than two decades, Dr. Naylor has led a multidisciplinary team of clinical scholars and health service researchers in generating and disseminating research findings designed to enhance the care and outcomes of chronically ill older adults and their caregivers. She is the architect of the Transitional Care Model, a care management approach proven in multiple NIH-funded clinical trials and foundation-sponsored translational efforts to improve older adults' experience with care and health outcomes, while decreasing use of costly health services. In recognition of her significant and sustained contributions to science and health care, Dr. Naylor has received multiple honors including election to the National Academy of Medicine (NAM), AcademyHealth's Distinguished Career Award, and the NAM's Gustav O. Lienhard Award for Advancement of Health Care. She completed six-year terms as a commissioner on the Medicare Payment Advisory Commission (MedPAC), board member of the National Quality Forum, and member of the Agency for Healthcare Research and Quality's National Advisory Council. Currently, Dr. Naylor is a member of the NAM's Leadership Consortium: Collaboration for a Learning Health System and co-chairs the Consortium's Culture Inclusion & Equity Action Collaborative. Additionally, she is a founding convener of the national Coalition for Trust in Health & Science.



Grace Terrell, MD, MMM, Chief Product Officer, IKS Health



Dr. Grace Terrell is a national thought leader in health care innovation and delivery system reform, and a serial entrepreneur in population health outcomes driven through patient care model design, clinical and information integration, and value-based payment models. She is Chief Product Officer at IKS Health, an international health care company designing simple solutions for the complex problems in health care. Dr. Terrell has been a practicing general internist for more than thirty years. She has served as CEO of several companies, including Eventus WholeHealth, LLC., a company focused on providing holistic care to medically vulnerable adults, and Cornerstone Health Care, one of the first medical groups to make the “move to value” by lowering the cost of care and improving its quality for the sickest, most vulnerable patients. She was the founding CEO of CHESS, a population health management company, and the former CEO of Envision Genomics, a company focused on the integration of precision medicine technology into population health frameworks for patients with rare and undiagnosed diseases. Dr. Terrell has served as Vice Chair of the Physician-Focused Payment Model Technical Advisory Committee (PTAC), the Chairman of the Board of the AMGA, is a founding member of the Oliver Wyman Health Innovation Center, the author of several books, including *Value-Based Care and Payment Models*, *Reframing Contemporary Physician Leadership: We Started as Heroes*, and *Strategies for Recognizing and Eliminating Gender Bias for Healthcare Leaders*. She is currently executive in residence at Duke University School of Medicine's Master of Management in Clinical Informatics (MMCi) Program, a Senior Advisor for Oliver Wyman Health and Life Sciences consulting practice, and a member of the board of trustees of Guilford College.

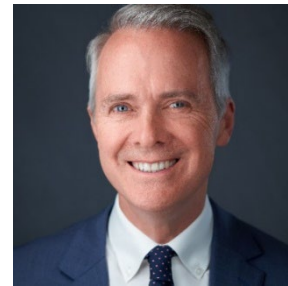
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Listening Session 3: Biographies (June 13, 10:50 a.m. – 12:20 p.m. EDT)

Subject Matter Experts

John Birkmeyer, MD, Sound Physicians

Dr. John Birkmeyer is President of the medical group at Sound Physicians, which comprises over 5,000 acute care physicians and advanced practitioners. In this role, he is responsible for clinical, financial and value-based performance across 350+ hospital practices nationwide. Before joining Sound, Dr. Birkmeyer was Executive Vice President of Integrated Delivery Systems and Chief Academic Officer at Dartmouth-Hitchcock. A graduate of Harvard Medical School and an elected member of the National Academy of Medicine, his research on hospital quality and costs has appeared regularly in the New England Journal of Medicine, JAMA, and Health Affairs.



Marc Rothman, MD, CMD, Signify Health



Dr. Marc Rothman has served as Chief Medical Officer of Signify Health since June 2020. Prior to joining Signify, Dr. Rothman served as Deputy Chief Medical Officer at Aspire Healthcare, where he led a nationwide palliative care medical practice and implemented and grew new clinical models and business lines. He also served as Enterprise Chief Medical Officer at Kindred Healthcare, Inc., where he oversaw medical affairs, clinical quality, patient experience and pharmacy services. Additionally, he served as the Chief Medical Officer of Kindred's Nursing Center Division, leading the medical and pharmacy leadership team. Dr. Rothman holds an MD from New York University School of Medicine and a BA in Philosophy from the

University of Wisconsin, Madison. He completed his postgraduate clinical training at Yale New Haven Hospital and is triple boarded in Internal, Geriatric and Hospice & Palliative Medicine.

Lewis G. Sandy, MD, FACP, SuLu Consulting, LLC

Dr. Lewis Sandy is a physician-executive, clinical strategist, and leadership/executive coach with a focus on health care. He is the co-founder of [Sulu Coaching](#), a boutique leadership/executive coaching firm. He previously served as Executive Vice President, Clinical Advancement, at UnitedHealth Group (UHG), a highly diversified health and well-being company dedicated to helping people live healthier lives and helping make the health system work better for everyone. At UHG he focused on clinical innovation, quality and patient safety, payment/delivery reforms, and physician/health professional collaboration. From 2003 to 2007, he served as Executive Vice President and Chief Medical Officer of UnitedHealthcare. From 1991 to 2003, Dr. Sandy served as Vice President and Executive Vice President of The Robert Wood Johnson Foundation, the nation's largest philanthropy dedicated solely to health. Prior to this, he was a physician executive at the Harvard Community Health Plan in Boston, Massachusetts. An internist with over 20 years in practice, Dr. Sandy received his BS and MD degrees from the University of Michigan and an MBA from Stanford University. Dr. Sandy was a faculty member, fellow, and RWJF Clinical Scholar at the University of California, San Francisco, and served his internship and residency at the Beth Israel Hospital in Boston. He serves on many Boards and Advisory Groups, including the Panel of Health Advisors for the Congressional Budget Office (CBO) and the Special Medical Advisory Group for the Department of Veterans Affairs. Dr. Sandy is a senior fellow of the University of Minnesota School of Public Health, Department of Health Policy and Management and a Visiting Fellow of the Duke-Margolis Center for Health Policy.

