

National PHR Project
Second Annual Meeting
January 21st 2006 -- 9am to 5:30pm
Executive Boardroom, Bellagio Hotel & Resort, Las Vegas

Start Time	Discussion Lead(s)	Topic	Duration
9:00am		Breakfast	
9:15am - 9:30am	Megan Mok	Introductions	15 mins
Consumer Advocacy and Caregivers			
9:30am - 10:15am	Linda Golodner and Ray Bullman	Status of Consumer Advocacy and PHR <ul style="list-style-type: none"> • Relevance of PHR for consumers • Current status and involvement of consumer advocacy in PHR policy development • Benefits to highlight and hurdles to expect when promoting PHR to consumers 	30 mins and 15 mins discussion
10:15am - 11:00am	Suzanne Mintz and Gail Hunt	Understanding Caregivers <ul style="list-style-type: none"> • Profiles of caregivers • Ways to target various groups • What works and what doesn't in marketing and positioning of PHRs • WHCOA and public policy focus on baby-boomers 	30 mins and 15 mins discussion
Providers and RHIOS			
11:00am - 11:45am	Jack Lewin, MD Nileen Verbeten	RHIOs, Quality Improvements, and PHR <ul style="list-style-type: none"> • Focus and concerns of RHIOs • Trends in government-sponsored Quality Improvement efforts • Opportunities for PHR 	30 mins and 15 mins discussion
11:45am - 12:30pm	Jonathan Wald, MD	Where is PHR in Health IT Landscape? <ul style="list-style-type: none"> • Status of PHR in marketplace • Different flavors of PHRs • EMRs that are PHR "want-to-be's" • How to differentiate? • Expectations for future of PHR 	30 mins and 15 mins discussion
Status Of Peoplechart			
12:30pm – 1:00pm (over part of lunch)	Dave Holvey Megan Mok	Peoplechart Overview <ul style="list-style-type: none"> • Enhancements completed in 2005 • Direct electronic capture for lab results • Pilot studies going forward • Observations about record requests and photocopying fees for study site patients 	20 mins and 10 mins discussion

Start Time	Discussion Lead(s)	Topic	Duration
Lunch (12:30pm-1:30pm)			
Hawaii			
1:30pm – 2:10pm	Dale Allison, PhD Jodi Shaw, LSW Jeannette Kojane	Study Site: Waikiki Health Center Study Site: HMSA Palliative Care <ul style="list-style-type: none"> Population profiles Enrollment logistic: What works; hasn't Marketing: What to emphasize Role of electronic data capture on plans Status and funding strategy 	30 mins and 10 mins discussion
2:10pm – 2:50pm	Whitney Limm, MD Glen Hayashida Victoria Page, RN	Study Site: Transplant Institute of Pacific Starting Site: Kidney Foundation of Hawaii <ul style="list-style-type: none"> Two population profiles: <ul style="list-style-type: none"> Organ transplant patients Kidney dialysis patients Enrollment logistic: what works, hasn't Marketing: What to emphasize Role of electronic data capture on plans Status and funding strategy 	30 mins and 10 mins discussion
Break (2:50pm- 3:00pm)			
Cleveland			
3:00pm – 3:40pm	Paul Alandt	Study Site: Golden Age Center <ul style="list-style-type: none"> Population profile Enrollment status Cultural effects of providers and of online identity theft on consumer behaviors Law versus resistance from physicians on patient's request for record access 	30 mins and 10 mins discussion
3:40pm – 4:25pm	Linda Noelker, PhD David Bass, PhD Bert Rahl (& Research Team)	Study Site: Benjamin Rose (Funded Study) <ul style="list-style-type: none"> Local funding strategy Scope and objectives of study Implementation plan and timeframe Application of PHR in case management 	30 mins and 15 mins discussion
Virginia			
4:25pm – 5:10pm	Bill Knaus, MD and Martha Hellems, MD (& Research Team)	Study Site: Virginia (Application Rewrite) <ul style="list-style-type: none"> Scope of study Study objectives and design Room for application improvement 	30 mins and 15 mins discussion
Funding Opportunities			
5:10pm-5:30pm	General Discussion	Other Research Funding Options	20 mins discussion
	Megan Mok	Closing	

Attendees:

Researchers

- **William (Bill) A. Knaus**, MD, FACP, Professor and Chairman, Department of Health Evaluation Sciences, University of Virginia School of Medicine
- **Kathy McDonald**, MM, Executive Director, Center for Health Policy and Center for Primary Care Outcomes Research, Stanford University School of Medicine
- **David Meltzer**, MD, PhD, Associate Professor in the Department of Medicine and Associated Faculty Member, Department of Economics, University of Chicago and The Harris School of Public Policy, University of Chicago (*Join by telephone.*)
- **Charon Pierson**, PhD, APRN, FAANP, Assistant Professor, Department of Geriatric Medicine, John A. Burns School of Medicine, University of Hawaii at Manoa

Hawaii: Waikiki Health Center

- **Dale Allison**, PhD, Director, Ho`ola Like Outreach Project, Waikiki Health Center

Hawaii: HMSA Palliative Care Coordination Project

- **Jodi Shaw**, LSW, CCM, Case Management Coordinator, Integrated Case Management Services, Hawaii Medical Service Association
- **Rachael Wong**, MPH, Project Coordinator and Educator of Kokua Mau (“Continuous Care” in Hawaiian) project, a statewide partnership of organizations
- **Joe Humphry**, MD, Medical Director, Hawaii Medical Service Association

Hawaii: St. Francis Medical Center Transplant Institute of Pacific

- **Whitney Limm**, MD, Director of Kidney Transplantation, Transplant Institute of the Pacific; Chief of General Surgery and Medical Director of Surgical Services, Queen’s Medical Center

Hawaii: National Kidney Foundation of Hawaii

- **Glen Hayashida**, CEO, National Kidney Foundation of Hawaii
- **Victoria Page**, RN, BSN, Director, Community Health Initiatives, National Kidney Foundation of Hawaii

California Team

- **Jack Lewin**, MD, EVP, CEO, California Medical Association
- **Nileen Verbeten**, VP, Economic Services, California Medical Association

Ohio: Benjamin Rose Organization (Cleveland)

- **Linda Noelker**, PhD, SVP, Benjamin Rose
- **David Bass**, PhD, Director of Research, Margaret Blenkner Research Institute
- **Bert Rahl**, Director of Mental Health, Benjamin Rose

Ohio: Golden Age Center (Cleveland)

- **Paul Alandt**, CEO, Executive Director, Golden Age Centers of Greater Cleveland

Virginia: Kluge Children's Rehabilitation Center (KCRC)

- **Martha Hellems**, MD, MS, Assistant Professor of Pediatrics, Division of General Pediatrics, University of Virginia, University of Virginia Hospital and Health System

Patient Advocacy

- **Ray Bullman**, EVP, National Council on Patient Information and Education
- **Linda Golodner**, President, National Consumers League
- **Gail Hunt**, President and CEO, National Alliance for Caregiving; Appointed member of the 2005 White House Conference on Aging (WHCOA) Policy Committee
- **Suzanne Mintz**, President, National Family Caregivers Association

Health Information Technology Supplier

- **Megan Mok**, MPP, MBA, President, Peoplechart Corporation
- **Dave Holvey**, MS, MA, Vice President of Operations, Peoplechart Corporation
- **Jeannette Koijane**, MPH, Project Coordinator, National PHR Project, Peoplechart

Invited Guests

- **Jonathan Wald**, MD, MPH, Associate Director, Clinical Informatics Research & Development, Partners HealthCare System, Inc.
- **Eduardo Ortiz**, MD, MPH, Associate Chief of Staff for Informatics, Director of Clinical Informatics and Decision Support, US Department of Veterans Affairs

Meeting Location:

Executive Boardroom, Bellagio Hotel and Resort

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