

**Weight Management DPG presents:**

**Build a Successful Weight Management Practice**

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**Ann Silver, MS, RD, CDE, CDN**

**Green Valley Ranch Resort & Spa**  
**Henderson, Nevada**

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**Objectives**

**After this presentation, the attendees will be able to:**

- ✓list the essential steps for establishing a private practice.
- ✓identify payment and reimbursement options in the private practice setting.
- ✓name two marketing strategies for launching a new practice.

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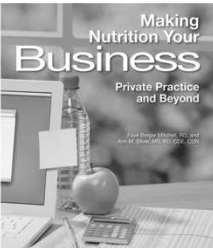
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**Disclosure**

**Faye Berger Mitchell, RD, LDN**  
**Ann Silver, MS, RD, CDE, CDN**



**A.N.D. Authors**  
*Making Nutrition Your Business: Private Practice and Beyond*  
 (AND 2011)

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**Weight Management**  
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From Employee to Self Employment –  
What Do You Call Yourself?

- Nutrition consultant
- RD in private practice
- Writer
- Entrepreneur

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IRS Guidelines for a Consultant

- Behavioral control
- Financial control
- Business relationship

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Business Advisors

- Accountant
- Attorney
- Banker

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**Weight Management**  
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Business Advisors

- Business consultant
- Marketing consultant
- Public relations advisor

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**Weight Management**  
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Business Advisors

- IT Consultant
- Coach
- Social Media Consultant

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Choosing an Appropriate Business Structure

- Sole proprietor
- Partnership
- Limited Partnership
- Corporation

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Sole Proprietor/One Person LLC

- Most common business structure
- 70% of all businesses
- Easiest and least costly

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Sole Proprietor/One Person LLC

- Your name or fictitious name
- SS # or federal tax ID#
- Business is not taxable entity

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Sole Proprietor/One Person LLC

- Pay self-employment tax
- Profit and losses are recorded
- Filed with individual return

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Partnership

- Two or more people
- No required legal documents
- Pool resources, talents and expenses

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Partnership

- Business partner not friend
- Spell out expectations
- Preferable in writing

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Limited Liability Company (LLC)

- Single member or multiple members
- Provides tax advantages
- Limits liability to business assets only

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Corporations

- "C" corporation
- "S" corporation
- PC or PA

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Licenses

- Nutrition license
- Seller's permit or license
- License for home-based business

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Insurance

- Malpractice
- General liability
- Property

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Insurance

- Life insurance
- Disability insurance
- Health insurance
- Business interruption insurance

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Liability Issues

- Documentation
- Confidentiality

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Finding Space

- Consider the impression you want to make
- Where will you do business?

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Questions to Ask

- How much space do you need?
- Do you need storage space?
- Do you want access to public transportation?
- Do you desire a traditional setting?

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Options for Space

Your choices:

- Renting
- Co-leasing
- Subleasing
- Home office
- Traveling office

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Renting

- \* Most traditional
- \* Can be costly
- \* Lease required
- \* Security deposit
- \* Negotiate

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International Board of Standards and Practices for Certified Nutritionists and Dietitians

Co-leasing

- \* Still renting
- \* Sharing office space
- \* Lease required – both parties sign
- \* Share rent and other expenses
- \* Define parameters

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Subleasing

- \* Good private practice option
- \* Lease from another professional
- \* Lease separate office in existing suite
- \* Sublease from physician is common

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Subleasing from MD  
How do you determine rent?

- \* “Rent as % of billings” often suggested
- \* Not advised
- \* Can be considered “fee splitting”
- \* Look for alternatives:
  - \* RD pay hourly, daily or monthly fee for use of office
  - \* RD receive consulting fee from physician

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Subleasing from MD  
What's included?

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- \* Who does scheduling?
- \* Is receptionist available?
- \* Who does billing?
- \* Can you use equipment?
- \* Who provides business cards?
- \* Who provides educational materials?

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Other Sublease Possibilities

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- \* Mental health professionals
- \* Dental office
- \* OT/PT office
- \* Day spas
- \* Executive offices
- \* Think out of the box!

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Before You Decide –  
Ask about...

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✓ Furniture	✓ Cleaning
✓ Bathroom access	✓ Parking
✓ <b>Kitchen area</b>	✓ Handicap access
✓ Signage	✓ Utilities
✓ Security	✓ Snow removal/ grounds keeping
	✓ Furniture

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Home Office – What to Consider

- \* Most affordable option
- \* Entrance
- \* Private space
- \* Waiting area
- \* Your comfort level
- \* Professional presentation
- \* Patient's comfort level
- \* Must be disciplined

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Traveling Office

- \* Home visits
- \* Office in a box
- \* Factor in travel time
- \* Organization is key

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Phone or Web Counseling

- \* Widens your market
- \* Less personal
- \* Investigate licensing and malpractice issues

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Outfitting Your Office

The Categories:

- Furnishings
- Equipment
- Business forms and supplies
- Patient counseling essentials

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Visualize Your Day

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Furnishings

- Purchase wisely
- Sources vary
- Consider your clientele
- Consider lighting

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Equipment

- Phone
- Computer
- Appointment "book"
- Copy/printer/fax/scanner

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Business Forms and Supplies

- Business cards
- Letterhead
- Forms

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Patient Counseling Essentials

Supplies:

- Educational materials
- Food models
- Medical equipment

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Patient Counseling Essentials

Patient Forms:

- Office policies
- Patient registration
- Release of information
- Superbill
- HIPAA forms

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Patient Counseling Essentials

Charting:

- Paper charts
- Electronic medical records (EMR)

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Let's talk...

MONEY

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Making MONEY

Factors affecting your financial health:

- ❖ Challenging financial and healthcare environment
- ❖ Your business skills and knowledge

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Develop your office policies

1<sup>st</sup> step:                      Answer questions

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Who will pay you?

Your choices:

   The patient

   and/or

   3<sup>rd</sup> party reimbursement

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**Who will pay you? The Patient** Weight Management  
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Procedure:

- ❖ Set a fee
- ❖ Inform patient of the fee prior to session
- ❖ Patient pays you
- ❖ Provide a superbill

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**Who will pay you? The Patient** Weight Management  
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A superbill:

- ❖ Provides a receipt for the patient
- ❖ Can be submitted if their insurance covers out-of network services

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**Who will pay you? The Patient** Weight Management  
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A Superbill includes 2 parts:

One part...

Provider information:

- Provider name
- Address
- Phone #
- NPI #
- EIN#
- License #

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Who will pay you? 3rd party reimbursement

Who is the:

- 1<sup>st</sup> party?
- 2<sup>nd</sup> party?
- 3<sup>rd</sup> party?

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Who will pay you? 3rd party reimbursement

- Private insurance companies or a contract
- Medicare
- Medicaid

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Who will pay you? 3rd party reimbursement

Prior to becoming a 3<sup>rd</sup> party provider:

- ✓ Obtain EIN #
  - [www.irs.gov](http://www.irs.gov), search EIN
- ✓ Acquire NPI #
  - <https://nppes.cms.hhs.gov>
- ✓ Copies of license, college degrees, liability policy, etc.

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**Who will pay you? 3rd party reimbursement** Weight Management  
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Identify 3<sup>rd</sup> Party Payers providing coverage in your office vicinity

- Contact District Reimbursement Reps
- Contact colleagues already providers
- Ask health care providers in your community
- Neighbors
- Your own physician

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**Who will pay you? 3rd party reimbursement** Weight Management  
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3<sup>rd</sup> Party Payers application:

- ❖ Private or commercial insurance
  - Contact insurance company individually via phone or online
- ❖ Medicare
  - <http://www.cms.gov>
- ❖ Medicaid
  - Application specific to each state
  - Contact your state Medicaid office or state DA reimbursement representative for specific information

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**Who will pay you? 3rd party reimbursement** Weight Management  
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Procedure

- Apply to become an in-network provider
- Rate of reimbursement set by the 3<sup>rd</sup> party
- Become a provider and see covered patients

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**Who will pay you? 3rd party reimbursement** Weight Management Academy of Nutrition and Dietetics

When patient calls for an appointment:

- Patient may need a referral +/- need to confirm coverage.

At initial visit:

- Obtain insurance card copy, referral if needed & copay

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**Who will pay you? 3rd party reimbursement** Weight Management Academy of Nutrition and Dietetics

After the visit:

- Submit the claim to the 3<sup>rd</sup> party for payment
- Time limit to submit from date of service
  - Usually 90 days except Medicare 1 year.
- Wait to get paid

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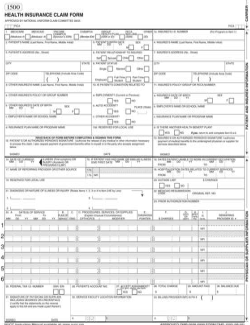
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**Who will pay you? 3rd party reimbursement** Weight Management Academy of Nutrition and Dietetics



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**Weight Management**  
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Who will pay you? 3rd party reimbursement

Pros	Cons
Stable and more predictable	Reimbursement rate
Potential for more volume	More administrative duties
Opportunity for follow up	Limitation to diagnoses and # of visits
Minimal marketing	

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**Weight Management**  
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How will you get paid?

- ❖ Cash and checks
  - No additional fees
- ❖ Credit cards and debit card
  - Additional costs

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**Weight Management**  
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When will you get paid?

- ❖ At time services are rendered
- ❖ Bill for services

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**Weight Management**  
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How much will you get paid?

Factors to consider:

- ✓ Overhead costs
- ✓ Your experience
- ✓ What the market will bear
- ✓ Patient reaction
- ✓ Initial visit and follow-up visit
- ✓ Determined by third party

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**Weight Management**  
Academy of Nutrition, Dietetics, and Obesity

Identify your office/payment policies

Decide the:

- Who?
- When?
- How?
- Where?
- How much?

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**Weight Management**  
Academy of Nutrition, Dietetics, and Obesity

Identify your office policies

Include:

- No shows or missed appointments
- Returned/bounced checks
- Unpaid balances

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**Weight Management**  
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**Sharing your office policies**

With each new patient:

- Verbally
- In writing
- Obtain signature of acknowledgment

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**Office policies in writing**

Office Policies of Ann M. Silver, MS, RD, CDE, CDN

1. Payment for services, including copays are due at the time services are rendered.
2. Assignment is accepted only from those insurance companies for which we are a provider.
3. You are responsible to obtain a referral if your insurance policy requires one. You will not be seen if you do not have a referral. If you want to be seen without a referral then you agree to self-pay for the visit at \$xxx for an initial visit and \$xxx for a follow-up visit.
4. If your insurance company denies coverage or payment you are financially responsible for the visit.
5. If we are not a provider of your insurance a Superbill will be provided for you to submit to your insurance for you to be reimbursed.
6. Payments can be made via cash, checks, Master Card, Visa, American Express and PayPal.
7. There is a \$XX fee for any returned/bounced checks.
8. Twenty-four (24) hour notice is required for cancellation or change of appointments or a \$XX fee will apply.
9. You will not be seen if you have an outstanding balance.
10. Outstanding balances after 60 days will be sent to collection. When an account is sent for collection you are responsible for an additional XX% fee to the balance.

I have read, understand, and agree to these policies.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**Help our profession**

<http://www.eatright.org/members/actioncenter.aspx>

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**Marketing**

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Why is marketing important?

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**How do you start to market practice?**

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Identify/Target your Market

- Geographic
- Specialty
- Niche

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**What/Who Are You Marketing?**

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- Mission Statement
- Philosophy

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**Know Your Market (and the bigger market)**

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- Food and consumer
- Be proactive

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**Evaluate The Competition**

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- Who are they?
- How are you different?
- Working together

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**Who to market to?**

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- Patients/Clients
- Referral sources
- Colleagues
- Everyone else

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**Marketing Tools**

Weight Management  
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Internet

- Website
- Emails
- Social media

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**Marketing Tools**

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Traditional and on the Internet

- Yellow pages
- Newspapers
- Directories

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**Marketing Tools**

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Other tools

- Letters
- Announcements
- Brochures
- In-services
- Health fairs
- Workshops

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**Weight Management**  
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Elevator speech

Describe yourself  
in  
30 seconds

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**Weight Management**  
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Who Are You?

In 20 words or less...

- ❖ Who are you and what you do?
- ❖ How will you help the patient/client?

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**Weight Management**  
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Marketing Tips

- Promote yourself based on success
- Give something away
- Be ready to change
- You need to spend \$ to make \$
- Don't be afraid to take risks
- Deliver fast
- Learn from your mistakes
- Have fun by doing what you love

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**Conclusion**

Your first steps to get started in your practice...

- Explore potential practice locations
- Consider how will you be paid
- Start marketing to get your name out

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