### Needs and Goals Assessment

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<th>Date:</th>
<th>Best day(s) to contact you (circle)</th>
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<td>Best times to contact you:</td>
<td>May I call you in the early evening? YES NO</td>
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<td>May I call you on Sat. or Sunday? YES NO</td>
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#### Place of Employment Category (Check All That Apply):

- [ ] Business/commercial company (for profit)
- [ ] Business/commercial (non-profit)
- [ ] Hospital
- [ ] Nursing home/long term care
- [ ] Clinic/health center
- [ ] Home health/hospice
- [ ] Public health department/rural health center
- [ ] University, college, school
- [ ] Professional membership association
- [ ] Physician’s office
- [ ] Dietetic internship program
- [ ] Other (specify):

#### Major Employment Areas or Responsibilities (Check All That Apply):

- [ ] Business management or supervisor
- [ ] Medical Nutrition Therapy (MNT)
- [ ] Hospital food and nutrition services management
- [ ] Diabetes Self-Management Education (DSME)
- [ ] Hospital inpatient clinical nutrition management
- [ ] Writing, editing, publishing, media work
- [ ] Program director or educator in academia
- [ ] Information technology/communications
- [ ] CDE
- [ ] Marketing and/or public relations
- [ ] Consultant
- [ ] Insurance billing or medical record claims coding
- [ ] Dietitian
- [ ] Community nutrition/nutrition education
- [ ] CDE
- [ ] Advocacy/association membership work
- [ ] Account Rep
- [ ] Teaching
- [ ] Chef
- [ ] Health promotion, wellness
- [ ] Research
- [ ] Other (specify):

#### Product Development, Product Distribution, Product Sales, Product Marketing/Advertising:

- [ ] Food
- [ ] Nutritional supplements/tube feedings
- [ ] Package/labels
- [ ] Medical equipment/supplies
- [ ] Food service supplies
- [ ] Glucose testing supplies
- [ ] Drugs, insulin
- [ ] Vitamin/mineral supplements
- [ ] Health/food related magazines
- [ ] Other:
WHICH CATEGORIES BELOW ARE YOUR NEEDS IN? (CHECK ALL THAT APPLY):

☐ THIRD PARTY REIMBURSEMENT (INITIATING, MAINTAINING, INCREASING) FOR:
  ○ Medical Nutrition Therapy (MNT)
  ○ Diabetes Self-Management Training/Education (DSMT, DSME)
  ○ Medical Nutrition Therapy (MNT)
  ○ Enteral Nutrition Tube Feedings
  ○ Parenteral Nutrition Feedings
  ○ Diabetes/Blood Glucose Testing Supplies
  ○ Diabetes/Blood Glucose Testing Supplies via Pharmacy Benefit Management
  ○ Insulin Pump and Training
  ○ Continuous Blood Glucose Monitoring System
  ○ In-Office Hemoglobin A1c Test
  ○ Other (specify):

Specific needs are for: ☐ Consulting    ☐ Training    ☐ Presentation    ☐ Article on:
  □ Medicare reimbursement coverage guidelines
  □ Private payer reimbursement coverage guidelines
  □ Claims coding
  □ Claims processing
  □ Completing CMS 1500 and/or UB04 claim form
  □ How to become Medicare MNT provider
  □ How to become credentialed provider with private insurance companies
  □ MNT/DSME superbill
  □ Physician referral/order form
  □ Other (specify):

☐ DEVELOPING and/or ENHANCING THESE PATIENT PROGRAMS IN YOUR PRACTICE SETTING (HOSPITAL, CLINIC, PHYSICIAN OFFICE, ETC.):
  ○ MNT
  ○ DSME
  ○ Weight Loss
  ○ Diabetes Prevention
  ○ Nutrition Wellness

☐ DEVELOPING YOUR OWN PRIVATE PRACTICE FOCUSED ON:
  ○ MNT
  ○ DSME
  ○ Weight Loss
  ○ Diabetes Prevention
  ○ Nutrition Wellness

Specific needs are for: ☐ Consulting    ☐ Staff Training    ☐ Presentation    ☐ Article on
  □ Program Development    □ Mary Ann to Conduct Program on:
  □ Using “differentiation of nutrition services” model to maximize market share by gaining competitive edge
  □ Detailed business plan for program operations/structure to maximize physician and self-referrals and patient attendance
  □ Outcomes tracking and management
  □ Curriculum for outpatient program
  □ Curriculum for inpatient diabetes survival skills training
  □ Deciding on which private practice reimbursement model to use (5 different models)
  □ Electronic (modifiable) forms for program and clinical operations: ☐ DSME ☐ MNT (patient attendance, patient assessment, nutrition diagnosis, nutrition prescription, nutrient/calorie calculation per calorie level,
Physician referral/order form
Staffing
Writing program proposal for administration
Program performa and budget
Marketing, advertising plan
Increasing physician referrals
Increasing self-referrals and/or program attendees
Decreasing patient appointment “no show” rates
Other (specify): ___________________________________________________________________

☐ OBTAINING RECOGNITION FOR DSME PROGRAM (REQUIRED FOR MEDICARE BILLING)

Specific needs are for: ☐ Consulting ☐ Training ☐ Presentation ☐ Article on:

☐ National Standards for Diabetes Self-Management Education
☐ American Association of Diabetes Educators’ new 7 behaviors for diabetes self-management

☐ PRESENTATIONS TO PROFESSIONALS

Topic(s) can be selected from list below* or can specify own topic.

Name of event: _____________________________________________________________
Sponsoring organization: __________________________________________________
Date of event: ___________________________ Date of presentation: ___________________
Location of event: _________________________________________________________
Is presentation planned as pre-conference workshop? ___YES ___NO ___MAYBE
Will presentation have outside sponsorship? ___YES ___NO ___MAYBE
Are CEUs desired? ___YES ___NO ___MAYBE
Time frame for presentation (minutes/hours): _________________________________
Attendees level of understanding of topic is assumed to be: ___minimal ___moderate ___advanced

☐ Specific topics (Mary Ann’s signature presentations):

  o Money Matters in MNT and DSME: Increasing Reimbursement Success in All Practice Settings
  o How to Implement a Successful Hospital-Based or Private Practice MNT Program
  o Diabetes Encounters of the Senior Kind: Unique Self-Management Challenges of the Older Person with Diabetes and Practical Ways to Minimize Them!
  o Zest for Life: Nutrition and Lifestyle for Healthy Aging
  o Update on the Nine Newest Medicare Provisions Impacting MNT Coverage and Utilization and New CPT Codes for RDs Use
  o T.A.P. into Personal and Professional Potential: A 15 Point Make-Over of Traits, Attitudes and Practices Leading to Extraordinary Success!
  o Patient Empowerment: Proven Model for Enhancing Behavior Change in Patients with Chronic Disease
  o FINALLY! A Super Easy, Step-by-Step Guide for Making a Nutrition Diagnosis
  o Critical Connections to Advance Your Career and Your Profession: Performance, Advocacy,
Competency and Expertise Sharing

- Improving the Quality and Effectiveness of Chronic Care Teams (Based on: Institute of Medicine’s Quality Chasm Report; Better Diabetes Care by National Diabetes Education Program; Breakthrough Series: IHI’s Collaborative Model for Achieving Breakthrough Improvement, ‘04 by Institute of Health Care Improvement)

- Business Matters: How to Create a Dynamic Business Plan for Building, Maintaining and Growing a Dietitian’s Private Practice

- How to Successfully Market Your Medical Nutrition Therapy Program and Your Private Practice: Don’t Just Survive, Thrive!

- “C” How to Increase Referrals and Patient Attendance in Hospital-Based MNT and DSME Programs: Proven Marketing Strategies Guaranteed to Keep Your Program Thriving!

- If a ‘Best Practice’ Nutrition Department is Your Dream, Then Implementing a “5 Star Quality Management Plan” Should Be Your Passion!

- Be a ‘Best Practice’: A Comprehensive Quality Management Plan for MNT and DSME Programs

- Simplifying and Summarizing the American Dietetic Association’s Medical Nutrition Therapy Evidence-Based Guides for Practice

- Developing a MNT and DSME Outcomes Management System: It’s Easier and More Essential Than You Think!

- A Dietitian’s Business Plan for Implementing a Successful Hospital-Based and/or Private Practice MNT Program


- Step-by-Step Guide for Obtaining American Diabetes Association Education Recognition Program Certification for Your Diabetes Education Program

- How to Establish a Successful Hospital-Based Outpatient MNT Clinic

- Everything the RD Needs and Wants to Know to Successfully Provide the Medicare MNT Benefit…And Then Some!

- Getting Paid What You’re Worth in a Physician’s Medical Practice: How the RD Can Determine and Negotiate the Best Business Plan

- Using and Understanding the Nutrition Care Process and Model

- Should a Private Practice Dietitian use a Medical Biller? Crunching the Numbers and Examining the Pros and Cons So You Can Decide!

- Train the Trainer Workshop on MNT and DSMT Programs: Obtaining Medicare and Private Payer Reimbursement, Increasing Referrals and Attendance and Enhancing Program Efficiency, Viability and Quality
Insider Secrets of Successfully Providing Reimbursable Medicare MNT and Therapeutic Diet Meals to Homebound Seniors in an Elderly Nutrition Program: The Time Has Come…Are You Ready?

Business Matters: How to Create a Dynamic Business Plan for Building, Maintaining and Growing Your Facility-Based, Reimbursable MNT Program

Six Super Star Metrics” for Evaluating the Performance and Value of Your MNT and DSME Programs…or Why Revenue is only 1/6 of the Programs’ True Value!

Any of these PowerPoint® presentations can be customized to fit your needs like a hand in a glove! They can also be formatted to fit the time frame allotted. Just ask! As I self-publish a manual on MNT and DSME reimbursement, another on establishing a MNT program and also sell electronic MNT and DSME forms, I offer a big discount to conference attendees upon purchasing these resources in the month following my talk. I also donate several copies of the manuals and the electronic forms for a raffle or door prizes for your meeting! This is my way of saying thanks for the honor of speaking to your group!

PRESENTATIONS TO CONSUMERS

- Nutrition in Pre-Dialysis Renal Disease
- Nutrition in Renal Failure
- Diabetes: S.W.E.E.T.S. Control
- Diabetes Prevention
- Nutrition in Primary Biliary Cirrhosis
- Weight Loss / Weight Control
- 5 Star Healthy Eating Plan
- The Skinny on Fad Diets
- Health Heart Nutrition
- Vitamins, Minerals, Supplements: Right for You?
- Dietary Fats: The Good, The Bad and the Ugly!
- The Newest Dietary Guidelines for Healthy Americans
- Healthy Restaurant Eating
- Controlling Eating Triggers: Trigger Foods, Moods and Situations
- My other interest is: __________________________

HAVING NUTRITIONALLY BALANCED MENUS WRITTEN FOR (SPECIFY):

HAVING AN INSTRUCTIONAL MANUAL WRITTEN ON (SPECIFY TOPIC):

HAVING MY PRODUCT OR SERVICE EXPERTLY REPRESENTED AND PROMOTED AT:

- Consumer trade show
- Professional trade show

Specify product or service:

TEACHING DIETETIC STUDENTS “REAL-WORLD” PRACTICAL SKILLS (Using ADA’s MNT evidence-based practice guidelines, MNT outcomes management, MNT and diabetes education reimbursement from Medicare and commercial payers, developing a private practice, developing a recognized diabetes self-management education program, constructing a business plan, writing a business proposal, patient empowerment, effective nutrition counseling skills, etc.)

OTHER CONSULTING AND/OR TRAINING NEEDS (SPECIFY):
Which of these parameters meets your needs best?  The CONSULTING/TRAINING IS:

- On site
- Off site
- Telephone conferences
- Other (specify):
- In half-day increments
- In whole day increments
- Other (specify):

What is your desired time frame for having your needs met?

What is your *firm* deadline?

If your need is for employee TRAINING, approximately about how many will be in attendance?

OTHER NEEDS, CONCERNS, COMMENTS:

OPTIONAL: How did you learn about MARY ANN HODOROWICZ CONSULTING, LLC?

- web search
- referral
- heard Mary Ann speak
- ADA practice group
- networking
- classified ad in magazine
- Internet listserv
- I’m a former patient of Mary Ann’s
- I’m a former or current client of Mary Ann’s
- other (specify):

ANYTHING ELSE?

Thank you for taking the time to complete this form! Please submit to Mary Ann (see bottom of page). I will contact you as soon as possible so we can talk further about meeting your needs.

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