Dear Friends and Colleagues:

We are pleased to share with you the 2014 Annual Report of Physician Health Services, Inc. (PHS). We remain committed to providing services to our medical colleagues seeking or needing help with drug/alcohol issues and/or behavioral difficulties that may impact their ability to function effectively as physicians. While continuing to provide a variety of direct services to a few hundred Massachusetts physicians and medical students, we have taken on important new work in the domain of problematic workplace behavior. We have worked closely with a number of medical leaders and physician coaches to create a structured remediation program designed to support professional coaching for physicians who behave in ways that interfere with harmonious teamwork in today’s demanding health care environment. This initiative is launching in the fall of 2014. We have also enhanced our associate director team with the addition of Dr. Peter Grinspoon, an internist, and Dr. Jacqueline Starer, an OB/GYN/addiction medicine specialist. Other unfolding projects include the adoption of a state-of-the-art database, and utilization of a photocellular breath alcohol analyzer for physicians in recovery. This tool promotes patient safety and makes testing more convenient. We have obtained a grant to expand our popular Managing Workplace Conflict course series, and we are exploring new approaches for engaging the general population of practicing physicians. To that end, Dr. Eddie Phillips, a dynamic leader in the important emerging field of lifestyle medicine, and Dr. Adelman have created a community blog, www.whatworks4me.org, to showcase and share personal and professional best practices.

Sincerely,

Edward J. Khantzian, MD, President
Steven A. Adelman, MD, Director

About Physician Health Services, Inc.

Physician Health Services, Inc., is a nonprofit corporation that was founded by the Massachusetts Medical Society to address issues of physician health. PHS is a confidential resource for physicians and medical students who may benefit from help addressing stress, burnout, work-life balance issues, and a variety of physical and behavioral health concerns that sometimes arise in today’s hectic health care environment. These include substance use difficulties, cognitive issues, psychiatric problems, the stress of medicolegal situations, and interpersonal challenges at work or at home. PHS provides resources to those who seek our services, and facilitates the assessment and structured remediation of individuals with mental health and substance use disorders, occupational problems, and neurocognitive challenges. Steven A. Adelman, MD, a board-certified psychiatrist with subspecialty expertise in addiction psychiatry and addiction medicine became the director of PHS in March 2013. With the help of physician associate directors located throughout Massachusetts, Dr. Adelman assists physicians, medical students, hospitals, colleagues, and family members of physicians who may be at risk.

Reasons to Contact PHS

PHS provides assistance with a wide variety of personal and professional situations. Any one of the following issues may represent a reason to refer someone to PHS or to contact us:

- Difficulty balancing work and family
- Difficulty managing stress, burnout, or financial pressure
- Difficulties managing a practice or coping with a competitive work environment
- Distressed or disruptive behavior
- Difficulty managing administrative burdens
- Challenges with retirement planning or a career change
- Anxiety, depression, and mood disorders
- Acute and/or post-traumatic stress
- Malpractice stress
- Stress following an unexpected outcome or medical error
- Medically induced trauma
- Alcohol and substance use concerns
- Interpersonal problems
- Concerns about loss of memory and age-related challenges
- Attention issues
- Learning disabilities
- Sleep disorders
- Eating disorders
- Medical problems
- Professional boundary issues
- Domestic violence
- Marital problems
- Compulsive gambling

Physician Health Services, Inc., is dedicated to improving the health, well-being, and effectiveness of physicians and medical students while promoting patient safety. This is achieved by supporting physicians through education and prevention, as well as assessment, referral to treatment, and monitoring.
PHS has been invaluable — not only in the assessment of my physician trainees — but in the recommendation and follow-up for a myriad of difficulties. As a physician-leader, I find that the utilization of PHS also assists the physician being evaluated to recognize that there actually is some issue that needs to be addressed, and it is not simply a matter of my own personal opinion.”

— Steve Bird, MD, UMass Memorial Medical Center

“As a vice president for medical affairs, I am confronted by serious and/or recurrent practitioner behavioral problems. Failure to address these matters compromises patient safety and staff morale. Frankly, practitioners impaired by substance abuse or major mental illness are relatively rare. Our greater challenge is the management of the recalcitrant and disruptive physician who undermines the clinical workplace with periodic displays of inappropriate and/or threatening behavior. Heretofore we had few tools to bring to bear on these situations, as they did not often rise to the point of engaging formal mental health services. We generally muddled through and we all suffered as a result. The recently introduced PHS program for Occupational Health Monitoring represents a breakthrough innovation for medical staff leaders grappling with these issues. Having a readily accessible, highly skilled, neutral third party with which to partner in assessing and addressing chronic workplace disruption has been of immense value to our organization. I commend PHS for engaging in this work and I encourage my colleagues to learn more about the program and how to use it in your leadership toolkit.”

— Harvey Kowaloff, MD, MMM, Vice President for Medical Affairs, Saint Anne’s Hospital

“I have been president of the medical staff at Lawrence General Hospital for many years and have come to rely on the services of PHS as part of my toolbox in dealing with physician behavior. Their approach is very effective and eminently fair to physicians by offering the necessary confidentiality in a remote setting, conducive of true dialogue. It is through this process that behavior modification can be fostered to the betterment of the physicians referred — most of all to the hospital and to me as chief of staff. The availability of this service is indispensable and it has prevented the premature initiation of a disciplinary process in many occasions. I have always found the professionals at PHS to be of the highest caliber and trustworthy, with the goal of protecting the referred physician rights foremost and taking meticulous precautions to maintain confidentiality when recommending monitoring or an outside referral for treatment. On the opposite end of the spectrum; when action is needed soon, their recommendations are clear and relevant to guide the medical staff in the hospital in moving ahead with the disciplinary process and mandatory reporting to the Board of Medicine. No wonder I count on PHS so much just as I would on my own staff!”

— Eduardo Haddad, MD, Medical Staff President and Co-Chair, Lawrence General Care Delivery Network

“My involvement in the PHS program was voluntary. They directed me to the help that was being offered. Now that I am in full recovery and finishing up a lengthy period of monitoring and oversight, I am so very grateful that PHS would be there for me, documenting my compliance with the Board of Registration in Medicine. Thanks to PHS I successfully completed the terms of my letter of agreement with the Board, and remained a productive member of the medical community.”

— Richard Levin, EdD, Executive Coach/Leadership Development, Wellesley Hills, MA

A Personal Story of Recovery

For additional stories of success, visit our website at physicianhealth.org under Helping Yourself or a Colleague

My experience at PHS was one that I had never expected. Early on, I resisted the help that was being offered. Now that I am in full recovery and finishing up a lengthy period of monitoring and oversight, I am so very grateful that PHS was there for me.

At the beginning, I was too sick to realize how sick I was. I had resisted getting help and I was about to lose everything important. By focusing on work, I couldn’t see the horrible mess my life was in.

So much has changed for me. I have three years of sobriety. I am different. I am happy. I understand that I’m an alcoholic. I work hard to accept my new reality at home; I have cried more in the past three years than I have in my lifetime — that was so long overdue.

My involvement in the PHS program was voluntary. They directed me to the help that I needed. Initially, that was a few months in a residential treatment
“Before you truly know that you are distressed beyond your capacity (against which you will continue to reassure yourself that you are fine — you have a choice anytime you choose to make it), contact PHS. My experience was both necessary and difficult. It has been life-changing. EVERYONE with whom I dealt over three years of miraculous improvement, leading to ‘happy, joyous, and free,’ demonstrated the utmost in professionalism, confidentiality, support, guidance, and reliability. I needed the treatment coupled with extended after-care. You might, too. You can trust PHS. Ask for help. It’s a novel undertaking — much easier than what you have confronted.”

“By providing a buffer against the potentially draconian actions of the Board of Medicine, and a group of colleagues in recovery with whom to identify, PHS offered me tools to transform a bridge from near-collapse to a state of personal and social function that I hadn’t previously imagined possible.”

“When I first came to the attention of PHS, I was acting in a dangerous and unpredictable manner. On the outside, my mood was arrogant and imperious. On the inside, I hated myself for not being able to control my drug use. I was certain that it was just a matter of time before I killed myself in some drug-induced misadventure. Because none of my previous efforts to stop using had worked, I had no belief that PHS could help me. But I was wrong. My PHS counselor seized upon my desperation and convinced me to give their program a chance. By attending their meetings, I was able to get honest with myself about my illness, my character defects, and my reasons for using narcotics. That’s when the real recovery began for me. I have nearly 14 years of recovery in PHS at this time. In my job, I am now a productive and trusted colleague. My personal life has been restored. I am happy. I no longer wake up each morning dreading the day and fearing the consequences of my use. The best part is that I get to participate in the recovery of my colleagues and watch the miracle unfold over time. The message of PHS is that in helping others we help ourselves. And it works.”

“Alcoholism is a strange disease. It is progressive and frequently fatal. Yet alcoholics like myself are usually in complete denial, refusing to admit that we have any problem at all, until we are on the brink of ruin. That was exactly my situation almost seven years ago, when I was referred to the PHS service. I had a potentially fatal illness that was putting my health, family, profession, patients, finances, morals, and sanity at extreme risk. Yet I continued to arrogantly, stubbornly deny that I had a problem. It is not overstating the case to say that I owe my health, profession, and sanity to the professionals at the PHS who evaluated and cared for me at that time and throughout the first three years of my recovery. Their professionalism and caring made it possible for me to find treatment and sobriety. And there has been so much more than that. My new life in sobriety is full of contentment beyond all my dreams. I like to say that my worst days in sobriety are better than my best days of drinking. Like so many men and women who participate in an AA program, I know a new freedom and a new happiness. My whole attitude and outlook upon life has changed. I owe my new life to the caring professionals at PHS, to my AA group, and to my Higher Power. Thank you!”

From Peer Support Group Attendees

“This has been the best thing to come out of a bad situation.”

“Over time, the group has become more beneficial to me, perhaps due to my need to ensure safety and confidentiality prior to being an active participant.”

“For this group, I think [confidentiality] is the most important issue.”

“It makes me realize how lucky I am.”

“Please don’t stop this group. It is fabulous.”

“The fact the group is a peer support group is uniquely helpful.”

“It has been non-judgmental, even when it challenges my own version or view of things. It has also been an arena in which, ironically, I can serve as a ‘doctor,’ a listener, confidant, advisor, helper — all reasons why I became a physician in the first place.”

“I’m starting to think that most physicians could benefit from these groups. Medicine is getting more stressful.”

“Great support group — it has made me a better person, friend, doctor.”

“Attending this group makes one realize (1) his vulnerability/inadequate attention to these issues, (2) the medical profession’s neglect of these important life parameters, and (3) how little physicians support one another under most circumstances outside of PHS.”
Case Activity
During the past year, PHS has improved physicians’ lives in the following ways:

- **264 physicians** have been helped directly through personalized consultative support services and monitoring contracts.
- **165 new physicians and medical students** were referred this year (see Figure 1).
- **115 health care professionals** consulted with PHS for resources. These services are provided to physicians, hospital administrators, attorneys, and anonymous individuals who contact PHS for advice regarding administrative, clinical, and legal matters pertaining to physicians with health or behavioral concerns.
- **56 educational sessions** were provided by PHS to physicians, hospitals, and individual practices. More than 2,100 physicians, medical students, and health care professionals were in attendance at the physician health educational offerings this year.

Monitoring Contracts
PHS maintains ongoing oversight of approximately 120 physicians and medical students with monitoring contracts. This number represents a slight increase from prior years. Of note is that PHS recommends a monitoring contract to approximately 27% of those referred each year.

- **Substance Use (SU) Monitoring Contract** — This contract is a minimum of three years in length and is designed to guide and document abstinence from substances of abuse.
- **Behavioral Health (BH) Monitoring Contract** — This contract addresses mental and behavioral health issues resulting from stress, emotional problems, and mental illness. The contract duration is a minimum of two years.

Presenting Problems
PHS addresses a broad range of physician health issues (listed by category in the table below). Behavioral health continues to be the largest group (N=59), followed by substance use disorders (N=47) and single-diagnosis mental health (N=35). Physicians also present with co-occurring mental health and substance use disorders and physical disabilities.

Status of Referrals — FY 2014
Of the 165 referrals to PHS the following recommendations were made:

![Figure 1: Referrals to PHS over the Past Ten Fiscal Years](image)

![Monitoring Contracts N=120](image)
**Meet Physician Health Services**

**The Board of Directors**
- Edward J. Khantzian, MD, President and Chair
- James D. Butterick, MD, Vice President and Vice Chair
- Corinne Broderick, MS, Director
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**The Staff**
- Linda R. Bresnahan, Director of Program Operations
- Debra A. Grossbaum, General Counsel
- Jessica L. Vautour, Outreach and Education Manager
- Deborah J. Brennan, Project Assistant and Transcriptionist
- Mary M. Howard, Monitoring Services Assistant
- Shari L. Mahan, Secretary
- Deborah M. Canale, Client Services Assistant

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**Legacy Contributors (> $200,000 annually)**
- Coverys
- CRICO
- Massachusetts Medical Society

**Major Contributors (≥ $5,000 annually)**
- Baystate Health, Inc.
- Berkshire Health Systems
- Blue Cross Blue Shield of Massachusetts
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- Brigham and Women’s Hospital
- Brigham and Women’s Physicians Organization (BWPO)
- Connecticut Medical Insurance Company (CMIC)
- Harvard Medical School, Program in Medical Education
- Harvard Pilgrim Health Care
- Lahey Health System
- Lawrence General Medical Staff
- Physicians Insurance Agency of Massachusetts (PIAM)
- Steward Health Care System
- Tufts Health Plan
- Tufts Medical Center
- Tufts University School of Medicine
- UMass Memorial Health Care, Inc.
- University of Massachusetts Medical School

*These contributors made donations that were received by PHS during fiscal year 2014 (June 1, 2013–May 31, 2014). Donations received after May 31 will be acknowledged in our next annual report.*

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**Physician Health Services**

**Revenue**
- MMS 35%
- CRICO 26%
- Coverys 14%
- Other 22%

**Expenses**
- PIAM 3%
- Physician Self-Help Program 17%
- Program Administration 18%
- Client Services 62%
- Education and Outreach 3%

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**Pre-audit**

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Thank You For Supporting PHS

I/we would like to support PHS and its mission.

Donor Name: _____________________________________
Address: __________________________________________
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Enclosed is my/our gift in the amount of:

☐ $1,000  ☐ $500  ☐ $250  ☐ $100  ☐ $50
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(Please make payable to Physician Health Services, Inc.)
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This gift is made:
☐ In memory of  ☐ In honor of  ☐ On the occasion of ________________________________

Please notify:
Name:  ___________________________________________
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Donor Recognition
☐ I authorize PHS to list my name as a contributor in the PHS Annual Report and PHS publications. This is how I would like my/our name(s) to appear in all donor recognition listings for which I/we may qualify:

☐ I do not wish my/our name(s) to appear in donor listings.

Other Ways to Give
☐ I would like to include PHS in my estate planning. Please contact me.
☐ I would like to discuss other ways to give to PHS. Please contact me.

An honorarium is not required. However, please consider a contribution to PHS in lieu of an honorarium. Our tax identification number is 22-3234975. Contributions to PHS are tax-deductible to the extent provided by law. Your organization will be acknowledged in the PHS Annual Report and PHS publications.

☐ In lieu of an honorarium, I would like to contribute to Physician Health Services.

☐ $1,000  ☐ $500  ☐ Other: $ _______________________
☐ Check No. ______________________________________
(Please make payable to Physician Health Services, Inc.)
☐ Visa  ☐ MasterCard  ☐ AMEX
☐ Credit Card No. ________________________________
Expiration Date: _____ /_____
Signature: ________________________________________

Faculty will be selected from the following list, based on availability:

Steven A. Adelman, MD  Peter Grinspoon, MD
Linda R. Bresnahan, MS  Debra A. Grossbaum, Esq.
Gary A. Chinman, MD  Ruthann Rizzi, MD
Wayne A. Gavryck, MD  Jacqueline Starer, MD

Return this completed form to:
Physician Health Services, Inc.,
860 Winter Street, Waltham, MA 02451