

Michael R. Callahan

Senior Counsel

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Practices

FOCUS: Health Care

Antitrust and Competition

Corporate

Health Care Litigation, Reimbursement
and Regulation

Health Care Regulatory and Compliance

Health Information Privacy and Security

Hospital-Physician Relations and Medico-
Legal

Privacy, Data and Cybersecurity

Industries

Clinical Integration and Managed Care

Education

JD, DePaul University College of Law

BA, Northern Illinois University

Bar Admissions

Illinois

Michigan

Community Involvements

American Bar Association

American Health Law Association (AHLA),
Fellows Coordinating Council, former
Chair of the Medical Staff, Credentialing
and Peer Review Practice Group

Credentialing Resource Center, Editorial
Board

DePaul College of Law, Mary and Michael
Jaharis Health Law Institute Advisory
Board

Illinois Association of Healthcare
Attorneys

A nationally recognized advisor to health care providers across the country, Michael Callahan provides deeply informed business and legal counseling in all areas of hospital-physician relations and health care regulatory compliance and governmental investigations, including the Emergency Medical Treatment and Active Labor Act (EMTALA), the Health Insurance Portability and Accountability Act (HIPAA), Medicare Conditions of Participation (CoPs), hospital licensure and accreditation standards. He is widely respected for his leading work on the Patient Safety Act from a regulatory compliance, policy and litigation standpoint, including the development of patient safety organizations (PSOs).

The knowledge to identify efficient and practical solutions

Health systems, hospitals and physician groups large and small across the country come to Michael for practical, real-world guidance and answers to challenging legal and operational issues, which he can provide quickly because of his many years of experience. He understands the reality of hospital quality, peer review, risk management and related operational legal and regulatory complexities and can rely on a large client base in order to provide better and comparative solutions.

He also is sought out by many of the largest health systems around the country for his understanding and interpretation of the Patient Safety Act. In a case of first impression he advised a national pharmacy that became the first provider to successfully assert an evidentiary privilege under the Patient Safety Act. Since that case, he has represented or advised many hospitals, physician groups and other licensed providers in creating or contracting with federally certified PSOs and has been directly involved in most of the major state appellate and federal court decisions interpreting the Patient Safety Act.

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National Association Medical Staff Services, former Public Member, Board of Directors

Northlight Theatre, former President and Member, Board of Directors

National Practitioner Data Bank, former Member, Executive Committee

Recognitions

Recognized or listed in the following:

- American Health Lawyers Association
 - Fellow, 2019–present
- AV Preeminent Peer Review Rating by LexisNexis Martindale-Hubbell
- *Best Lawyers in America*
 - Health Care Law, 1991–2024
- *Chambers USA*
 - Healthcare, 2005–2023
- Illinois Association Medical Staff Services
 - Leadership Award, 1995 and Honorary Lifetime Member
- LAF Katten José de Diego Legal Clinic
 - Volunteer of the Year, 2017
- Massachusetts Association of Medical Staff Services
 - Honorary Lifetime Member
- National Association Medical Staff Services
 - ICON Award, 2020
- New York State Association for Medical Staff Services
 - Honorary Lifetime Member
- *Super Lawyers*
 - Illinois, 2005–2020

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News

- Katten Attorneys Distinguished by *Best Lawyers*® (August 17, 2023)
- *Medical Staff Briefing* Quotes Michael Callahan on Protecting 'Peer Review' Materials (June 13, 2023)
- Katten Boosts Rankings in *Chambers USA Guide 2023* (June 1, 2023)
- Michael Callahan Explains Importance of Patient Safety Organizations in *Credentialing Resource Center Journal* Interview (November 8, 2022)
- Katten Attorneys Recognized by *Best Lawyers*® (August 18, 2022)
- Katten Ranked Leading Law Firm by *Chambers USA 2022* (June 1, 2022)
- Michael Callahan Discusses Issue of Over-Reporting Physician Discipline to National Database with *Medical Staff Briefing* (March 4, 2022)
- Coronavirus (COVID-19) Resource Center (November 10, 2021)
- Katten Attorneys Listed in *The Best Lawyers in America*® (August 19, 2021)
- Katten Boosts Rankings in *Chambers USA 2021* (May 20, 2021)
- *Credentialing Resource Center Journal* Interviews Michael Callahan on Aging Physician Policies (March 24, 2021)
- Michael Callahan Discusses CMS-1135 Waivers with *Credentialing Resource Center Journal* (March 23, 2021)
- Michael Callahan Honored With ICON Award (October 8, 2020)
- Katten Attorneys Distinguished as Top Legal Talent in the 2021 *Best Lawyers in America* and *Best Lawyers: Ones to Watch* Lists (August 20, 2020)
- Coronavirus (COVID-19) Federal and Illinois Health Care Primary Legal Sources (April 27, 2020)
- Katten Rated Top Law Firm by *Chambers USA 2020* (April 23, 2020)

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- Katten Attorneys Selected to 2020 Illinois Super Lawyers, Rising Stars Lists (January 29, 2020)
- Michael Callahan Profiled by DePaul College of Law (November 12, 2019)
- Katten Lauded Top Ranked Law Firm by *Chambers USA* 2019 (April 25, 2019)
- Super Lawyers Lists Honor More Than 50 Katten Attorneys in Illinois (January 24, 2019)
- Michael Callahan Quoted on Patient Safety Act Privilege Decision (July 23, 2018)
- Katten Rated as Leading Law Firm by *Chambers USA* 2018 (May 3, 2018)
- Katten Attorneys Recognized in 2018 Illinois Super Lawyers, Rising Stars Lists (January 25, 2018)
- Michael Callahan Quoted on Physician Whistleblower Protections (January 22, 2018)
- Katten Recognized as Leading Law Firm by *Chambers USA* 2017 (May 30, 2017)
- Michael Callahan Quoted on Legal Issues in the Peer Review Process (March 1, 2017)
- Katten Attorneys Recognized in 2017 Illinois *Super Lawyers*, Rising Stars Lists (January 13, 2017)
- 79 Katten Attorneys Selected for *Best Lawyers in America*® 2017 (August 15, 2016)
- Michael Callahan Featured in "New PSO Guidance Raises Questions Over Patient Safety Work Product Privilege" White Paper (August 2016)
- Michael Callahan Quoted on Voluntary and Paid Proctors (July 2016)
- *Chambers USA* 2016 Distinguishes 22 Katten Practices and 50 Attorneys (May 27, 2016)
- Michael Callahan Quoted in "Utilizing Proctors for Competency Evaluations" White Paper (March 2016)

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- Forty-Seven Katten Attorneys Recognized in 2016 Illinois *Super Lawyers* List (January 8, 2016)
- Partner Michael Callahan Quoted on Privilege Issues Surrounding Patient Safety Activities (December 1, 2015)
- 91 Katten Attorneys Recognized in *Best Lawyers in America*® 2016 (August 17, 2015)
- Katten Attains 22 Practice and 58 Attorney Rankings by *Chambers USA* 2015 (May 20, 2015)
- Partner Michael Callahan Quoted on Responsible Health Care Credentialing (April 22, 2015)
- Fifty-Three Katten Attorneys Recognized in 2015 Illinois *Super Lawyers* List (January 12, 2015)
- Partner Michael Callahan Quoted in *Healthcare Risk Management Review* Article on Healthcare Reform Effects on Providers (October 24, 2014)
- 85 Katten Attorneys Named to *Best Lawyers in America*® 2015 (August 18, 2014)
- Partner Michael Callahan Comments on Changes to *NPDB Guidebook* in *Medical Staff Briefing* (June 9, 2014)
- *Chambers USA* 2014 Distinguishes 24 Katten Practices and 54 Attorneys (May 23, 2014)
- Partner Michael Callahan Discusses Issues Facing Medical Boards in *Credentialing & Peer Review Legal Insider* (January 30, 2014)
- Fifty-Four Katten Attorneys Recognized in 2014 Illinois *Super Lawyers* List (January 13, 2014)
- Michael Callahan Comments on Compliance Challenges for ACOs (January 6, 2014)
- Michael Callahan Quoted on Proposed Changes to the National Practitioner Data Bank (January 6, 2014)
- Partner Michael Callahan Discusses Medical Staff Drug and Alcohol Testing with *Healthcare Risk Management* (November 6, 2013)

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- 83 Katten Attorneys Lauded in *Best Lawyers in America*® 2014 (August 15, 2013)
- Partner Michael Callahan Discusses Da Vinci Robotic Surgery Lawsuits with *Credentialing & Peer Review Legal Insider* (June 4, 2013)
- Partner Michael Callahan Quoted in *American Medical News* on Managing Medical Staff Conflicts (June 4, 2013)
- *Chambers USA* 2013 Recognizes 24 Katten Practices and 49 Attorneys (May 24, 2013)
- Sixty-Nine Katten Attorneys Included on 2013 Illinois *Super Lawyers* List (January 4, 2013)
- Partner Michael Callahan Quoted in *American Medical News* on Court Interpretations of Patient Safety Act (November 19, 2012)
- 80 Katten Attorneys Named to *Best Lawyers in America*® 2013 Guide (August 24, 2012)
- Partner Michael Callahan Quoted in *Credentialing & Peer Review Legal Insider* on Protecting Peer Review Information (August 22, 2012)
- *Chambers USA* 2012 Distinguishes 19 Katten Practices and 45 Attorneys (June 7, 2012)
- Eighty-Six Katten Attorneys Named 2012 Illinois Super Lawyers (February 28, 2012)
- Partner Michael Callahan Quoted in *American Medical News* on Conflicts Between Hospital Employment Contracts and Medical Staff Bylaws (January 23, 2012)
- Partner Michael Callahan Quoted in *Chicago Tribune* Regarding New Regulations Allowing More Liberal Hospital Visitation Policies (September 14, 2011)
- 75 Katten Attorneys Named to *Best Lawyers in America*® 2012 Guide (September 12, 2011)
- Katten Earns Recognition for 17 Practices and 44 Attorneys in 2011 *Chambers USA* Guide (June 10, 2011)

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- Partner Michael Callahan Quoted in BNA Health Law Reporter on Tortious Interference Case (October 7, 2010)
- Partner Michael Callahan Quoted in Medical Staff Briefing on Medical Staff Mergers (September 2010)
- 70 Katten Attorneys Named to *Best Lawyers in America*® 2011 (August 9, 2010)
- Partner Michael Callahan Quoted in Credentialing & Peer Review Legal Insider on PSO Reporting (July 2010)
- Katten Lands 16 Practices and 39 Attorneys in *Chambers USA* Guide (June 24, 2010)
- Partner Michael Callahan Quoted in *HealthLeaders* on Compensation for Medical Staff Leaders (April 22, 2010)
- Partner Michael Callahan Quoted in *Medical Staff Briefing* on Joint Commission Draft (March 2010)
- Partner Michael Callahan Quoted in *Credentialing and Peer Review Legal Insider* on Preventing Hearings (March 2010)
- Partner Michael Callahan Quoted in *Medical Staff Briefing* on Expectations for Governing Boards (February 2010)
- Partner Michael Callahan Quoted in *Modern Healthcare* on new Joint Commission Standards (January 11, 2010)
- Partner Michael Callahan Quoted in HealthLeaders Media on a New Joint Commission Medical Staff Standard (January 4, 2010)
- Partner Michael Callahan Quoted in *Credentialing and Peer Review Legal Insider* on Fair Hearings (November 2009)
- Michael Callahan Quoted in *Medical Staff Briefing* (October 2009)
- 66 Katten Attorneys Named to 2010 List of *Best Lawyers in America*® (August 5, 2009)
- Partner Michael Callahan Quoted in *Credentialing & Peer Review Legal Insider* on Apparent Agency Claims (July 2009)

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- Katten Lands 14 Practices and 37 Attorneys in *Chambers USA* Guide (June 12, 2009)
- Partner Michael Callahan Quoted in *American Medical News* on Economic Credentialing Ruling (March 16, 2009)
- Partner Michael Callahan Quoted in *Medical Staff Briefing* on Physician Lawsuits (February 9, 2009)
- Partner Michael Callahan Quoted in *Credentialing & Peer Review Legal Insider* on Medical Staff Bylaws (November 2008)
- Partner Michael Callahan Quoted in *American Medical News* on Medical Staff Bylaws Case (October 6, 2008)
- 50 Katten Attorneys Named to 2009 List of *Best Lawyers in America*® (September 23, 2008)
- Partner Michael Callahan Presents Webinar on "Poliner Decision Reversed" (August 27, 2008)
- Partner Michael Callahan Quoted in *Medical Staff Briefing* on Exclusive Contracts (July 2008)
- Katten Lands 14 Practices and 32 Attorneys in *Chambers USA* Guide (June 13, 2008)
- Partner Michael Callahan Quoted in *Medical Staff Briefing* (June 2008)
- Partner Michael Callahan Quoted in *Credentialing and Peer Review Legal Insider* on ED Coverage (June 2008)
- Partner Michael Callahan Quoted in *AMNews* on Court Decision (April 28, 2008)
- Partner Michael Callahan Quoted in *AMNews* on Court Decision (April 28, 2008)
- Partner Michael Callahan Quoted in *Credentialing and Peer Review Legal Insider* (April 2008)
- Partner Michael Callahan Quoted in *American Medical News* on Medical Staff Bylaw Issues (February 11, 2008)

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- 46 Katten Attorneys Named to 2008 List of *Best Lawyers in America*® (October 31, 2007)
- Partner Michael Callahan Quoted in *Credentialing and Peer Review Legal Insider* on Board Certification for MDs (October 24, 2007)
- Joint Commission Response to Open Letter (August 30, 2007)
- Open Letter to the Joint Commission Regarding MS.1.20. (August 22, 2007)
- Katten Lands 15 Practices and 28 Attorneys in *Chambers USA* Guide (June 15, 2007)
- Katten Lands 12 Practices and 24 Attorneys in *Chambers USA* Guide (June 7, 2006)

Publications

- Privacy, Data and Cybersecurity *Quick Clicks* | Issue 6 (June 2023)
- In a Case of First Impression, a Connecticut Trial Court Rules That Investigation Materials Were Privileged Under the Patient Safety and Quality Improvement Act and State Laws (April 18, 2023)
- Trial Court Rules that Hospital's Safety Event Minutes Were Privileged Under PSQIA and State Law (August 1, 2022)
- 6 Best Practices for Designing and Implementing Patient Safety Evaluation System (PSES) Policies in Order to Maximize Privilege Protections Under the Patient Safety Act (June 6, 2022)
- *Health Care Law Perspectives* (August 2020) | Contributor
- New State Appellate Court Interpretation of the Patient Safety Act Privilege Protections (June 3, 2020)
- Integrating Medical Staffs (Part One) (August 8, 2019)
- Three Important Hospital Actions Concerning Incident Report Discovery (January 10, 2019)

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- Illinois Appellate Court Upholds Privilege Protections Under the Patient Safety and Quality Improvement Act of 2005 (July 23, 2018)
- *Health Care Perspectives* (April 2017)
- Florida Supreme Court Rules That Hospital "Adverse Medical Incidents" Reported to a PSO Are Not Privileged From Discovery: Impact on Participating Providers and PSOs (February 22, 2017)
- Improving Patient Safety Reporting With the Common Formats: Common Data Representation for Patient Safety Organizations (September 29, 2016)
- Illinois Supreme Court Upholds "Willful and Wanton" Immunity Protection in Peer Review Cases (June 7, 2016)
- Patient Safety Organizations: What Every MSP Must Know (April 6, 2016)
- OCR Kicks Off HIPAA Audits After Issuing Two Major Settlements (March 22, 2016)
- *Health Care Perspectives* (March 2016)
- Questioning Discoverable Data In Negligent Credentialing Suits (February 29, 2016)
- Illinois Supreme Court Rules Physician's Application File and Data Bank Report Information Discoverable in a Negligent Credentialing Lawsuit (February 22, 2016)
- Protecting Patient Safety Is Critical (July 20, 2015)
- *Health Care Perspectives* (May 2015)
- *Redesign the Medical Staff Model: A Guide to Collaborative Change* (March 4, 2015)
- *Redesign the Medical Staff Model: A Guide to Collaborative Change* (March 4, 2015)
- PSO Reminder: Hospitals Need to Contract with a PSO in Order to Participate in State Insurance Exchanges (June 17, 2013)
- Final HIPAA Rule Has Sweeping Impact on Covered Entities and Business Associates (January 29, 2013)

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- Illinois Appellate Court Upholds Application of Patient Safety Act to Deny Access to State's Subpoena for Walgreens' Medication Error Incident Reports (June 7, 2012)
- *Health Care Credentialing Update* (November 2011)
- *Health Care Update* (November 2011)
- CMS Issues Final ACO Regulations (November 10, 2011)
- Government Issues Eagerly Awaited Proposed ACO Regulations (April 12, 2011)
- *Health Care Update* (October 2010)
- *Health Care Credentialing Update* (October 2010)
- *Health Care Update* (October 2009)
- *Health Care Credentialing Update* (October 2009)
- HHS Issues Security Breach Notice Rule (August 31, 2009)
- NPDB Renders Opinion on Standard for Required Data Bank Reports (August 12, 2009)
- Illinois Adopts New Medical Staff Summary Suspension Standard (July 23, 2009)
- Eliminating Negligence in Physician Credentialing (February 2009)
- Ask the expert: What would you consider or define as a privilege restriction and who can or should be able to impose such a restriction? (January 29, 2009)
- Duty to Disclose in Illinois After Kadlec (July 25, 2008)
- Kadlec Decision Reversed (May 8, 2008)
- Illinois Appellate Court Upholds \$8 Million Negligent Credentialing Verdict for Hospital's Failure to Follow Credentialing Criteria (March/April 2008)
- 10 Steps to Protect Sensitive Practitioner Data (March 2008)
- Be Aware of Temporary Reappointment Option (January 2008)
- Keeping the Medical Staff in Compliance with Federal Laws (December 2007)

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- Illinois Appellate Court Upholds \$8 Million Negligent Credentialing Verdict for Hospital's Failure to Follow Credentialing Criteria (November 2007)
- The Joint Commission Has Spoken on MS.1.20 — Now What? (November 2007)
- Put Board Certification in Context When Privileging MDs (October 2007)
- Know Your Facility's Exclusive Contracts (July 2007)
- Hospital Counsel vs. Medical Staff Counsel: Conflicting Perspectives on Current Medical Staff Legal Issues (June 22, 2007)
- Medical Resident On Board: Privileging for Visiting Practitioners (June 2007)
- Use Caution When Negotiating NPDB and Other Reports (June 2007)
- Use Your Wellness Committee When Dealing with Drug-Impaired Docs (January 2007)
- Consider Medical Staff Membership Options for Low-Volume Providers (December 2006)
- Keep Legal Implications in Mind When Constructing a Proctoring Program (November 2006)

Presentations and Events

- IHA/MAPS Caselaw Updates and National Patient Safety Initiatives (February 7, 2024)
- MAMSS 40th Annual Education Conference (May 17–19, 2023) | *Presenter* | *Year in Review and Impact on MSPs*
- NYSAMSS 2023 Annual Conference (May 3–5, 2023) | *Presenter* | *“Legal Year in Review: Impact on MSP's” and “Integrating Medical Staffs in a Multi-Hospital System”*
- IAMSS 42nd Annual Education Conference (April 27–28, 2023) | *Presenter* | *Legal Updates in the MSP World*

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- 2023 Texas Hospital Association PSO Spring Summit (April 27–28, 2023) | *Presenter* | *"Best Practices in Developing a More Effective PSES policy" and "How to Respond to a Regulator's Demand for PSWP"*
- CX Customer Summit 2023 (January 18–20, 2023) | *Presenter* | *Leveraging a Patient Safety Organization to Improve Surgical Quality and Safety*
- The Patient Safety Act 14 Years Later: Lessons Learned and Mistakes to Avoid (October 19–November 2, 2022) | *Presenter* | *"PSQIA Overview," "Designing More Effective PSES Policies" and "Maximizing PSQIA and State Peer Review Protections"*
- NAMSS 46th Educational Conference and Exhibition (September 11–14, 2022) | *Presenter* | *"Integrating Medical Staffs in a Multi-Hospital System: Challenges, Options and Proposed Solutions" and "Year in Review: Legal Impact on MSPs"*
- NAMSS 2022 Virtual Roundtable (September 8, 2022) | *Panelist* | *Standardizing Quality: Best Practices for Measuring Practitioner Competency,*
- MAMSS 42nd Annual Virtual Educational Conference (May 5-6, 2022) | *Presenter* | *To Report or Not Report to the NPDB? That is the question*
- MAMSS 39th Annual Education Conference (May 4-6, 2022) | *Presenter* | *How to Respond to 3rd Party Inquiries for Privileged Information, Negligent Credentialing Developments and NPDB Over-Reporting*
- IAMSS 41st Annual Conference (April 7-8, 2022) | *Presenter* | *The Legal World of Credentialing*
- What Every Healthcare Provider Needs to Know for Maximum PSO Protections (March 3, 2022) | *Presenter* | *Understanding Federal and State Laws and Best Practices for Maximizing PSO Privilege Protections*
- Risky Business: Mitigating Legal Hazards (December 9, 2021) | *Co-Presenter* | *Risky Business: Mitigating Legal Hazards*
- ECRI and the ISMP PSO 2021 Annual Meeting (November 3, 2021) | *Panelist* | *Patient Safety Evaluation System Panel*
- NAMMS 45th Educational Virtual Conference & Exhibition (October 18–21, 2021) | *Presenter* | *Year in Review: Legal Impact on MSPs*

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- Patient Safety Organizations: What Every Ambulatory Care Provider Needs to Know (October 13, 2021) | *Presenter* | *Patient Safety Organizations: What Every Ambulatory Care Provider Needs to Know*
- Patient Safety Organizations 101: Patient Safety Work Product Privilege in the Context of PSOs (June 2, 2021) | *Presenter* | *Patient Safety Organizations 101: Patient Safety Work Product Privilege in the Context of PSOs*
- IAMSS 40th Annual Education Conference (May 18, 2021) | *Presenter* | *To Report to the Data Bank or Not: That is the Question!*
- MAMSS 38th Annual Virtual Education Conference (May 13–14, 2021) | *Presenter* | *To Report to the Data Bank or Not: That is the Question!*
- NYSAMSS 40th Annual Educational Conference (May 5–7, 2021) | *Presenter* | *To Report to the Data Bank or Not: That is the Question!*
- IHA and MAPS Presents How to Respond to Regulator's Requests for PSWP (April 22, 2021) | *Presenter* | *Understanding Federal and State Laws and Best Practices for Maximizing PSO Privilege Protections*
- 44th NAMSS Educational Virtual Conference & Exhibition (October 5–8, 2020) | *Presenter* | *Year In Review: Legal Developments Affecting MSPs*
- 39th Annual Educational Conference (September 17–18, 2020) | *Presenter* | *COVID-19 NYS Executive Orders from a Legal Perspective*
- MAMSS 37th Annual Virtual Education Conference (September 10–11, 2020) | *Presenter* | *Physician Late Career Policies Under EEOC Attack*
- Recent Contrasting and Conflicting Patient Safety Act Opinions and Lessons Learned (June 17, 2020) | *Presenter* | *Recent Contrasting and Conflicting Patient Safety Act Opinions and Lessons Learned*
- How to Respond to Regulator's Requests for PSWP – Part 2 (June 16, 2020) | *Presenter* | *How to Respond to Regulator's Requests for PSWP – Part 2*
- COVID-19 — Legal Updates Affecting Medical Staff Professionals (June 10, 2020) | *Presenter* | *COVID-19 — Legal Updates Affecting Medical Staff Professionals*

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Senior Counsel

- How to Maximize Peer Review Protections Under the Patient Safety Act and Responding to Governmental Demands for PSWP (June 4, 2020) | *Presenter* | *How to Maximize Peer Review Protections Under the Patient Safety Act and Responding to Governmental Demands for PSWP*
- Physician Late Career Policies Under EEOC Attack (May 12, 2020) | *Co-presenter* | *Physician Late Career Policies Under EEOC Attack*
- Basic Law Protections for Healthcare Organizations Under the Patient Safety Act and Illinois Medical Studies Act – Part 1 (April 21, 2020) | *Presenter* | *Basic Law Protections for Healthcare Organizations Under the Patient Safety Act and Illinois Medical Studies Act – Part 1*
- COVID-19: Legal Updates Affecting MSPs (April 7, 2020) | *Co-presenter* | *COVID-19: Legal Updates Affecting MSPs*
- Patient Safety Organizations (PSOs): What Every Physician Group and Ambulatory Services Provider Needs to Know (February 10–11, 2020) | *Presenter* | *Patient Safety Organizations (PSOs): What Every Physician Group and Ambulatory Services Provider Needs to Know*
- Recent Patient Safety Act Legal Developments: Operational and Litigation Lessons Learned (January 30, 2020) | *Presenter* | *Recent Patient Safety Act Legal Developments: Operational and Litigation Lessons Learned*
- How to Respond to a Regulator's Demand for PSWP (January 28, 2020) | *Presenter* | *How to Respond to a Regulator's Demand for PSWP*
- Protecting Your PSWP During a CMS Survey (January 22, 2020) | *Presenter* | *Protecting Your PSWP During a CMS Survey*
- Peer Review: The Fundamentals (January 8, 2020) | *Presenter* | *Peer Review: The Fundamentals*
- Patient Safety Work Product (PSWP) Privilege in the Context of Patient Safety Organizations (December 19–20, 2019) | *Presenter*
- Defending Against Patient Safety Act Discovery Requests – Case Law Development and Lessons Learned (December 5, 2019)
- NAMSS 43rd Educational Conference & Exhibition (October 19–23, 2019) | *Presenter* | *Year in Review: Legal Developments Affecting MSP*

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Responsibilities | Achieving a Just Culture Approach to the Medical Staff and APPs

- Integrating Medical Staffs in a Multi-Hospital System: Challenges, Options and Proposed Solutions (September 18, 2019) | *Presenter: Integrating Medical Staffs in a Multi-Hospital System: Challenges, Options and Proposed Solutions*
- Working With a PSO in Physician and Other Ambulatory Care Practices to Improve Patient Safety Outcomes (June 19, 2019) | *Presenter*
- Maximizing State and Federal Privilege Protections: Litigation Lessons Learned (June 18, 2019) | *Presenter*
- ECRI Institute PSO Annual Meeting (May 9, 2019) | *Presenter | Maximizing Your Privilege Protections Under the Patient Safety Act: Lessons Learned*
- 2019 NYSAMSS Annual Conference (May 9–10, 2019) | *Presenter | Integrating Medical Staffs*
- 38th Annual IAMSS Education Conference (April 10–12, 2019) | *Presenter | Privileging Nightmares*
- Judge Egan's Monthly CLE Seminar (March 27, 2019) | *Co-Presenter | Litigation Privileges: Medical Studies Act & Patient Safety Act*
- Hospital Insurance Forum (March 17–20, 2019) | *Presenter | How to Maximize Hospital Peer Review Privilege Protections Under State and Federal Law in Order to Defend Against Negligent Credentialing and Other Liability Claims*
- The Intersection of the Patient Safety & Quality Improvement Act and the Medical Studies Act: Steps to Maximize State and Federal Privilege Protections (March 7, 2019) | *Presenter*
- MSO Rights, Roles, and Responsibilities When Working with HR to Credential and Privilege Employed Providers (February 28, 2019) | *Presenter*
- Successful PSO Protections: Lessons Learned from Ingalls Memorial Hospital (October 18, 2018) | *Presenter | Successful PSO Protections: Lessons Learned from Ingalls Memorial Hospital*

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- NAMSS 42nd Educational Conference & Exhibition (September 29 – October 3, 2018) | *Presenter* | *Important Legal Developments and Impact on MSP Responsibilities* | *Maximizing Your Peer Review Privilege and Confidentiality Protections Under State and Federal Law*
- Answers to MSPs Most Difficult Questions (June 20, 2018) | *Presenter*
- Overview of the Patient Safety Act (May 15, 2018) | *Presenter*
- MAMSS 39th Annual Educational Conference (May 2–4, 2018) | *Presenter* | *Maximizing Peer Review Privilege Protection under Michigan Law and the Patient Safety Act*
- 2018 Annual NYSAMSS Conference (April 25–27, 2018) | *Presenter* | *Privileging Nightmares and Legal Ramifications*
- IAMSS 37th Annual Education Conference (April 11–13, 2018) | *Presenter* | *Do Your Medical Staff Bylaws Hurt or Help You?: Compliance Gaps and Best Practices*
- Medical Staff Rules, Regulations, Policies, and Procedures: Maximizing the Role of Medical Services Professionals and Staff Attorneys, Part III (March 20, 2018) | *Co-presenter*
- Healthcare Law & Compliance Institute (March 4–6, 2018) | *Presenter* | *Integrating Medical Staffs: Challenges and Solutions*
- Illinois Medical Studies Act Under Attack: Problems and Proposed Solutions (December 13, 2017) | *Presenter*
- Legal Update: Impact of Recent Cases on Patient Safety Work Product (December 7, 2017) | *Presenter*
- PSO Legal Developments: Florida Hospital Options After *Charles* and *Edwards* (November 15, 2017) | *Presenter*
- NAMSS 41st Educational Conference & Exhibition (October 21–25, 2017) | *Presenter* | *Legal Update: Legal Developments Affecting Medical Staff Professionals* | *Do Your Medical Staff Bylaws Help or Hurt You? Compliance Gaps and Best Practices*

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Senior Counsel

- IRMS 33rd Annual Risk Managers' Meeting (October 5, 2017) | *Presenter* | *Maximizing Your State and Federal Peer Review Protections in a Clinically Integrated Provider Network*
- Writing Medical Staff Bylaws: How to Avoid Compliance Gaps and Implement Best Practices (July 19, 2017) | *Presenter*
- Illinois Association of Medical Staff Services 2017 Education Conference (May 18–19, 2017) | *Presenter* | *NPDB Review and Reporting—Am I Responsible?*
- MAMSS 34th Annual Education Conference (May 10–May 12, 2017) | *Presenter* | *Massachusetts Peer Review Privilege Protections: How Do They Apply?*
- MAMSS 38th Annual Conference (May 3–5, 2017) | *Presenter* | *Best Steps to Avoid the Need for Fair Hearing & Data Bank Reports*
- Vizient University Health System Consortium Joint Networks Meeting (April 26–27, 2017) | *Presenter* | *“PSO Legal Update: Compliance and Defense Recommendations”*
- Midwest Alliance for Patient Safety PSO: Understanding PSO Privilege and Confidentiality (March 27, 2017) | *Presenter*
- Healthcare Law & Compliance Institute (March 5–7, 2017) | *Presenter* | *Think Tank Session: How Participation in a PSO Improves Quality Outcomes, Reduces Liability Risks and Enhances Reimbursement*
- Unique Advantages and Protections Offered by PSOs to Improve Patient Care (March 2, 2017) | *Presenter*
- GAMSS 1st Quarter 2017 Meeting (February 22, 2017) | *Presenter* | *Legal Update: Review of Key Legal Decisions and Their Impact on Medical Services Professionals*
- Scope of State Peer Review Statutory Privileges beyond Hospital Medical Staffs—Peer Review in Physician Groups, ACOs, CINs and PHOs (February 1, 2017)
- Impact of Recent PSO Regulatory and Legal Developments on PSOs and Participating Providers Part Two: Practical Application of Patient Safety Act Standards to Adverse Event Scenarios (November 8, 2016) | *Presenter*

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Senior Counsel

- Texas Hospital Association Patient Safety Organization Orientation and Collaborative Workshop (October 26, 2016) | *Presenter* | *Design and Implementation of Your PSES: A Dialog About Maximizing Protection and Improving Patient Care*
- Impact of Recent PSO Regulatory and Legal Developments on PSOs and Participating Providers Part One: Overview and Impact of Recent PSO Guidance and Guides on PSOs and Providers (October 19, 2016) | *Presenter*
- 2016 Vizient Clinical Connections Summit (September 28, 2016) | *Presenter* | *Legal Implications of Working with a PSO*
- 40th Annual NAMSS Educational Conference & Exhibition (September 19, 2016) | *Presenter* | *What Every Medical Staff Professional Needs to Know About Patient Safety Organizations (PSOs)* | *Legal Update: Review of Key Legal Decisions and Their Impact on Medical Staff Professionals*
- 2016 Morrissey Technology and Educational Conference (August 17–19, 2016) | *Presenter* | *Privileging Nightmares and the Legal Ramifications* | *Presenter* | *Unique Advantages and Protections Offered by PSOs to Improve Patient Care*
- Impact of the HHS PSO Guidance on Advancing Quality and Maximizing Privilege Protections With a PSES Policy (June 21, 2016) | *Presenter*
- Michigan Association Medical Staff Services 37th Annual Conference (May 4–6, 2016) | *Presenter* | *New Data Bank Guidebook: Clarifications and Challenges*
- FAMSS 2016 Annual Educational Conference (May 4–7, 2016) | *Presenter* | *Patient Safety Act and Patient Safety Organizations*
- IAMSS 33rd Annual Education Conference (April 28–29, 2016) | *Presenter* | *Negligent Credentialing & MSSP Role in Hearings*
- 2016 Annual NYSAMSS Conference (April 27–29, 2016) | *Presenter* | *Negligent Credentialing*
- Vizient 2016 Academic Medical Center Networks Meeting (April 20–21, 2016) | *Presenter* | *Credentialing and Privileging of APNs and PAs*
- Current Trends in Negligent Credentialing (April 19, 2016)

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- Healthcare Law & Compliance Institute (March 6–8, 2016) | *Presenter* | *Think Tank Session: Patient Safety Organizations—Compliance Requirements and How to Maximize Confidentiality and Privilege Protections*
- Impact of Recent Regulatory Changes on Medical Staff Bylaws: Proposed Amendments and Best Practices (March 3, 2016) | *Presenter*
- Physicians and Hospitals Law Institute (February 8, 2016) | *Co-presenter* | *ACO/CIN Provider Denials and Terminations: Procedural Protections, Immunities, and Databank Reporting*
- PSO 301: Discussion of PSO Court Cases and the Litigation Lessons Learned (January 26, 2016)
- PSO 201: PSO Standards Applied to Real-World Scenarios (January 19, 2016)
- PSO 101: Overview of Patient Safety Act (January 12, 2016)
- Optimizing Health System Privilege and Confidentiality Protections and Improving Patient Care by Participating in a Patient Safety Organization (November 19, 2015) | *Participant*
- Fundamentals of Health Law (November 16, 2015) | *Presenter* | *Fundamentals of Hospital Medical Staff Issues: Minimizing Risk and Maximizing Collaboration*
- CHRMS Law Day 2015 (November 13, 2015) | *Panelist* | *Maximizing Privileges for Peer Review Activities – State Law Protection or the Patient Safety Act?*
- NAMSS 39th Educational Conference & Exhibition (October 3–7, 2015) | *Presenter* | *How to Avoid or Limit the Need for Peer Review Fair Hearings and Data Bank Reports*
- An Advanced Look at the New NPDB Guidebook (September 17, 2015) | *Presenter*
- 2015 Morrissey Technology and Educational Conference (August 19–21, 2015) | *Panelist* | *Efficient Credentialing and Privileging Decision Making in a Healthcare Network* | *Panelist* | *PSO Update and MCCM Risk Management Demonstration, Including the New PSO Module*

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- The Changing PSO Landscape: National & Legal Perspectives (July 30, 2015) | *Panelist*
- MAMSS 32nd Annual Education Conference (May 15, 2015) | *Presenter* | *Massachusetts Legal Update*
- MAMSS 36th Annual Conference (May 5, 2015) | *Presenter* | *Dealing with Disruptive Physicians*
- 2015 Annual NYSAMSS Conference (April 30–May 1, 2015) | *Presenter* | *Disruptive, Aged & Impaired Physicians Legal Updates* | *Presenter* | *Legal Updates: NYS Cases and Statutory Developments*
- Illinois Association Medical Staff Services 34th Annual Education Conference (April 23, 2015) | *Presenter* | *Injury Prevention: CMS Updates: What Must Go Into Your Bylaws*
- GAMSS Spring Conference (April 13, 2015) | *Presenter* | *Final Medicare Medical Staff Conditions of Participation: What Should Be in Your Bylaws*
- Health Care Law and Compliance Institute (March 1–3, 2015) | *Speaker* | *Outpatient Ancillary Services: Creative Structures for Competing into the Future*
- Case Law Updates and Implications for Member PSES Activity (December 17, 2014) | *Presenter*
- Center for Advancing Provider Practices 2014 National Summit (November 20, 2014) | *Panelist* | *Trends in Regulation and the Federal Trade Commission Update*
- Fundamentals of Health Law (November 12–14, 2014) | *Presenter* | *Fundamentals of Hospital/Medical Staff Issues: Minimizing Risk and Maximizing Collaboration*
- Final CMS CoPs: Navigating Revised Medical Staff Standards and New Requirements (November 11, 2014) | *Presenter*
- Coverys Conference – Changes in Healthcare's Effects on Medical Professional Liability (November 5, 2014) | *Presenter* | *Impact of Health Care Reform on Provider Liability*
- Child Health PSO Implementation (November 4, 2014) | *Presenter*

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- Coverys Conference – Changes in Healthcare's Effects on Medical Professional Liability (October 21, 2014) | *Presenter* | *Impact of Health Care Reform on Provider Liability*
- NAMSS 38th Education Conference & Exhibition (October 4–8, 2014) | *Presenter* | *The New NPDB Guidebook: What's Old and What's New?*
- Medical Staff Bylaws: Compliance Gaps and Best Practices (September 17, 2014) | *Presenter*
- Medical Staff Bylaws: Compliance Gaps and Best Practices (September 10, 2014) | *Presenter*
- MAMSS 31st Annual Education Conference (May 14–16, 2014) | *Presenter* | *Do Your Medical Staff Bylaws Hurt or Protect You? Identification of Compliance Gaps and Best Practices*
- Patient Safety Organizations: Optimizing Protection From Discovery Under the Patient Safety Act (May 8, 2014) | *Presenter*
- Health Care Arbitration and Peer Review Hearings (May 1–2, 2014) | *Presenter*
- New York Association of Medical Staff Services Annual Education Conference (April 23–25, 2014) | *Presenter* | *NPDB: The Guidebook Changes and How They May Affect You*
- IAMSS 33rd Annual Education Conference (April 24–25, 2014) | *Presenter* | *Do Your Medical Staff Bylaws Hurt or Protect Your Identification of Compliance Gaps and Best Practices*
- Risk Managers Forum (April 7–8, 2014) | *Panelist* | *Discussion on Patient Safety Organizations (PSOs)* | *Presenter* | *Impact of Healthcare Reform on Pediatric Hospital Liability*
- The ABCs of Antitrust in Health Care, Part VI: Medical Staff Privileges, Exclusive Physician Contracts, and Peer Review (March 20, 2014) | *Presenter*
- Impact of Health Care Reform on Provider Liability (November 20, 2013) | *Presenter*

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- Fundamentals of Health Law (November 3–5, 2013) | *Presenter* | *Fundamentals of Hospital Medical Staff Issues: Minimizing Risk and Maximizing Collaboration*
- ASHRM 2013 Annual Conference & Exhibition (October 28, 2013) | *Presenter* | *Patient Safety Organizations: Legal Developments and Compliance Guidance*
- Patient Safety Organization Overview – a Legal Perspective (October 3, 2013) | *Presenter*
- Quantros Pharmacy Quality & Safety Summit (September 25, 2013) | *Presenter* | *Patient Safety Organizations: Legal Protection Opportunities and Challenges*
- Evidence Based Risk Management: Using a Patient Safety Organization to Validate Risk Management Efforts (September 24, 2013) | *Panelist*
- NAMSS 37th Educational Conference & Exhibition (September 21–25, 2013) | *Speaker* | *The Evolution of the Accountable Care Organization and Accountable Care Organizations: Overview and Impact on Medical Staff Professionals*
- Child Health Patient Safety Organization Annual Meeting (September 18, 2013) | *Speaker* | *The PSO Legal Environment*
- Morrissey Leadership Council Meeting (August 14, 2013) | *Presenter* | *Overview of Significant Changes from Affordable Care Act of 2010*
- 2013 30th Annual MAMSS Education Conference (May 15–17, 2013) | *Presenter* | *Revisions to the Medicare CoPs and The New HIPAA Omnibus Privacy Rules: In the Trenches Implications for Expanding Healthcare Systems*
- Managing Peer Review Hearings and Litigation (May 15, 2013) | *Presenter*
- Managing Peer Review Investigations: How to Avoid Hearings and Litigation (May 8, 2013) | *Presenter*
- IAMSS 32nd Annual Education Conference (April 25, 2013) | *Speaker* | *Negligent Credentialing – Hypothetical Case and Best Practices to Limit Exposure*

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- 2013 Annual NYSAMSS Conference (April 24–26, 2013) | *Presenter* | *Impact of Recent Revisions to Medicare Conditions of Participation and Dealing with Disruptive, Impaired or Aging Practitioners*
- Center for Patient Safety Annual PSO Participant Meeting (April 17, 2013) | *Presenter* | *Challenges and Successes to PSO Protections to Date*
- Hospital Insurance Forum's 2013 Spring Membership Meeting (March 17–20, 2013) | *Speaker* | *The Impact of ACOs on Liability*
- Practical Guidance and Proposed Solutions in Response to HIPAA Omnibus Final Rule (February 21, 2013) | *Presenter*
- Graduate Medical Education Bootcamp Webinar Series, Part V: Fellows (Advanced) (January 10, 2013) | *Moderator*
- American Society for Healthcare Risk Management 2012 Annual Conference & Exhibition (October 7–12, 2012) | *Presenter* | *Patient Safety Organizations: Legal Update and Practical Solutions After Walgreens Case*
- IPT/IRMS 28th Annual Risk Managers' Meeting (September 28, 2012) | *Speaker* | *Impact of Health Care Reform on Provider Liability: Issues and Proposed Solutions*
- Fifth Annual AACU State Society Network Advocacy Conference (September 23, 2012) | *Speaker* | *Accountable Care and Shared Savings Programs - Where Do Urologists Fit In*
- UHC Annual Conference 2012 (September 11–14, 2012) | *Presenter* | *Patient Safety Organizations: Legal Update and Practical Solutions*
- National Association Medical Staff Services 36th Annual Conference & Exhibition (September 5–6, 2012) | *Presenter* | *Dealing with Disruptive, Impaired Practitioners and Aging Practitioners and Hospital Liability in an Era of Health Care Reform*
- 17th National Morrissey User Group Meeting (August 15–17, 2012) | *Presenter* | *Key Regulatory Update – Healthcare Reform, Including Status of Accountable Care Organizations (ACO) and Patient Safety Organizations (PSOs)*
- AHLA 2012 In-House Counsel Program and Annual Meeting (June 24–27, 2012) | *Presenter* | *Systems-Based Approach to Quality: Critical Liability*

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and Accreditation Challenges and Exposures and Enterprise Risk Management and Conducting Peer Review in Evolving Health Systems

- Massachusetts Association of Medical Staff Services Annual Spring Conference (May 18, 2012) | *Presenter* | *2012 Update: Impact of Accountable Care Organizations (ACOs) and Health Care Reform on Credentialing, Privileging, and Peer Review*
- The Hospital Medical Staff of the Future Webinar Series, Part III: The Jigsaw Puzzle: Credentialing and Privileging Providers in the Era of Healthcare Reform (May 10, 2012) | *Presenter*
- The Affordable Care Act in 2012: Implications for Physicians, Quality Management and Medical Staff Services Professionals (March 22, 2012) | *Presenter*
- Chicago Bar Association Health Law Committee Meeting (March 2, 2012) | *Presenter* | *Impact of Health Care Reform on Corporate Negligence and Related Hospital Liability Standards*
- The Affordable Care Act in 2012: Understanding the Changes (January 19, 2012) | *Presenter*
- Volume to Value: Strategies for Maximizing Your Margins (January 11, 2012) | *Panelist*
- American Society for Healthcare Risk Management 2011 Annual Conference & Exhibition (October 18–19, 2011) | *Presenter* | *Patient Safety Organizations: Legal Update and Practical Solutions After Walgreens Case*
- Illinois Risk Management Services Annual Risk Managers' Meeting (October 5–7, 2011) | *Presenter* | *What the Risk Manager Should Know About Medical Staff Bylaws*
- PSOs Made Easy! (October 6, 2011) | *Presenter*
- Disruptive Physicians: From Credentialing to Disciplinary Action (September 28, 2011) | *Presenter*
- National Association Medical Staff Services 35th Annual Conference & Exhibition (September 24–28, 2011) | *Presenter* | *Building a Foundation for Accountability and Affordability...Healthcare Reform in 2011 and Beyond*

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- United Healthcare Consortium Annual Meeting (September 21–23, 2011) | *Speaker*
- 36th Annual National Association for Healthcare Quality Educational Conference (September 17, 2011) | *Presenter* | *Ethics and Integrity in Healthcare Quality Practice*
- Chicago Bar Association Health Law Committee Meeting (September 9, 2011) | *Presenter* | *Patient Safety Organizations Overview, Benefits and Practical Applications Under Health Care Reform*
- 16th National Morrisey User Group Meeting (August 17, 2011) | *Presenter* | *Building a Foundation for Accountability and Affordability...Healthcare Reform in 2011 and Beyond and Patient Safety Organizations (PSO) – Definition, Overview and Benefits*
- AHLA Annual Meeting and In-House Counsel Program (June 26–29, 2011) | *Presenter* | *Impact of ACOs on Physician/ Provider Membership Decisions*
- 2011 Annual MAMSS Educational Conference (May 20, 2011) | *Presenter* | *Current Issues in Negligent Credentialing and Impact of Accountable Care Organizations (ACOs) and Health Care Reform on Credentialing, Privileging and Peer Review*
- 2011 Annual NYSAMSS Educational Conference (May 19, 2011) | *Presenter* | *Legal Update: Case Developments in New York that Affect MSPs and Impact of Accountable Care Organizations (ACOs) and Health Care Reform on Credentialing, Privileging and Peer Review*
- 30th Annual FAMSS Educational Conference (May 5, 2011) | *Presenter* | *Current Issues in Negligent Credentialing Parts 1 and 2* | *Presenter* | *Case Developments that Affect Florida MSPs* | *Presenter* | *Effective Documentation of Peer Review Under Amendment 7* | *Presenter* | *Impact of*
- 30th Annual IAMSS Education Conference (April 28–29, 2011) | *Presenter* | *Legal Update*
- University HealthSystem Consortium's Joint Council Meeting: Maximizing Quality and Safety, Minimizing Risk (April 14, 2011) | *Presenter* | *Retaliation Against Whistle Blowers: A Chronic Problem or Isolated Occurrence?* |

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Presenter | PSOs: To Participate or Not: Advantages, Disadvantages and Questions Answered

- Credentialing Issues 2011 (February 11, 2011) | *Presenter*
- Advanced Credentialing and Privileging Retreat (January 29–31, 2011) | *Speaker*
- Mastering Medical Leadership (January 29–31, 2011) | *Speaker*
- Medical Executive Committee Institute (January 27–29, 2011) | *Speaker*
- Mastering Medical Leadership (November 6, 2010) | *Speaker*
- Advanced Credentialing and Privileging Retreat (November 6, 2010) | *Speaker*
- MAMSS 2010 Fall Educational Conference (November 5, 2010) | *Speaker | Low-Volume/No-Volume Practitioner | Low-Volume/No-Volume Practitioners: What's the Solution for Your Hospital? | Speaker | Impaired and Aging Physicians | Speaker | Legal Update: Case Developments in Maryland that Affect MSPs | Speaker | MS*
- Disruptive Physicians: From Credentialing to Disciplinary Action (November 4, 2010) | *Speaker*
- 2010 Legal & Compliance Council Annual Meeting (October 18, 2010) | *Speaker | Negligent Credentialing Developments: Impact of Recent Cases and New Joint Commission Medical Staff Standards*
- Debriefing on the FTC/CMS/OIG Workshop on the Legal Issues Related to Accountable Care Organizations (ACOs) (October 7, 2010) | *Presenter*
- NAMSS 34th Annual Conference & Exhibition (October 2–6, 2010) | *Speaker | Impact of MS.01.01.01. on Bylaws and Medical Staff Governance*
- Medical Staff Credentialing and Healthcare Reform (August 26, 2010) | *Presenter*
- Chief Medical Officers Forum (July 15, 2010) | *Presenter | Legal and Practical Strategies in Dealing with Disruptive Physicians*
- 2010 Annual Meeting & In-House Counsel Program (June 29, 2010) | *Speaker*

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- Patient Safety Organizations: A Fundamental Tool in the World of Health Care Reform, Enhanced Reimbursement, Quality Improvement and Confidentiality Protections (June 17, 2010) | *Presenter*
- Not Your Average Fraud Seminar (June 17, 2010) | *Presenter* | *A Strategic Approach to Managing Risk in an Environment of Heightened Scrutiny*
- Medical Executive Committee Institute (June 10–12, 2010) | *Presenter*
- Physician-Legal Issue Conference (June 10, 2010) | *Presenter* | *Dealing with Disruptive Physicians*
- Navigate MS.01.01.01 with NAMSS (June 8, 2010) | *Speaker*
- The Final Verdict on MS.01.01.01 (May 11, 2010) | *Speaker*
- 16th Annual Education Symposium (May 10, 2010) | *Speaker* | *Health Care Fraud*
- Credentialing Resource Center Symposium (May 7, 2010) | *Speaker* | *Current Issues in Negligent Credentialing* | *Speaker* | *The Impact of PSO Confidentiality and Privilege Protections on the Peer Review Process* | *Speaker* | *Best Practices in Initial Appointment and Reappointment Procedures*
- 2010 NYSAMSS Annual Education Conference (May 6, 2010) | *Presenter* | *Developments in Negligent Credentialing and Strategies for Limiting Liability* | *Presenter* | *Best Practices in Appointment and Reappointment Procedures* | *Presenter* | *Impact of MS 01.01.01 on Medical Staff Bylaws*
- CHRMS' 30th Anniversary Annual Meeting (April 30, 2010) | *Presenter* | *Patient Safety Organizations—To Participate or Not: That Is the Question*
- Medical Staff, Credentialing, and Peer Review Practice Group Mid-Year Luncheon (February 26, 2010) | *Presenter* | *Gaining Greater Peer Review Protections Under Patient Safety Organizations*
- Advanced Credentialing and Privileging Retreat (January 17, 2010) | *Speaker* | *Can I Be Sued?* | *Speaker* | *Recent Credentialing Cases*
- Medical Executive Committee Institute (January 16, 2010) | *Speaker* | *Healthcare Law: What Medical Staff Leaders Must Know to Play by the*

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Rules and Stay Out of Trouble and How to Manage a Fair Hearing and Investigation

- Mastering Medical Leadership (January 16, 2010) | *Presenter* | *Case #1: Hospital Financial Performance and the Medical Staff* | *Presenter* | *Case #2: Legal and Regulatory Impact on Privileging Decisions Community*
- NAMSS Professional Development for Credentialing Specialists with Overview of Case Law (December 3–4, 2009) | *Speaker*
- Joint Commission Update: Final Telemedicine Standards and Proposed Medical Staff Standards—What You Need to Know Now (December 1, 2009) | *Presenter*
- MAMSS 2009 Fall Educational Conference (November 13, 2009) | *Speaker* | *How Your Bylaws Will Be Affected By MS.01.01.01*
- GMSI Pre-Conference Workshops (November 7, 2009) | *Speaker* | *Medical Staff Bylaws: How to create documents that are clear, compliant, and fair*
- Stacking the Chips in Healthcare: Building a Wealth of Knowledge (October 5–7, 2009) | *Speaker* | *Patient Safety Organizations: The Impact on Hospitals and Medical Services Professionals*
- How to Expand Existing Peer Review Protections, Obtain Active Physician Participation and Comply with TJC Standards (October 1, 2009) | *Presenter*
- Achieving Medical Staff Greatness – The Role of Trustees and Management (September 24, 2009) | *Speaker*
- 2009 Influenza Planning Conference (August 26, 2009) | *Speaker* | *Addressing Healthcare Worker Illness*
- 14th National Morrisey User Group Meeting (August 20, 2009) | *Speaker* | *Economic Credentialing—The Changing Landscape*
- Patient Safety Organizations: What You Need to Know to Implement a PSO Program and Manage Confidentiality and Privilege Protections (August 18, 2009) | *Speaker*
- Economic Credentialing—Dead or Alive in an Era of Healthcare Reform and Competition? (July 28, 2009) | *Moderator*

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- Dialogue on Discipline: Two Perspectives on Physician Discipline and Implementing New Peer Review Legislation (July 14, 2009) | *Speaker*
- New Federal Legislation and its Impact on Medical Malpractice Litigation: The Implications of the Federal Patient Safety Act for Your Healthcare Clients (June 10, 2009) | *Presenter*
- The 26th Annual MAMSS Education Conference (May 27–30, 2009) | *Speaker* | *Patient Safety Organizations*
- Top 5 Credentialing Cases: What Everyone Should Know (May 14–15, 2009) | *Speaker*
- 15th Annual Health Financial Management Association Education Session and Golf Outing (May 7, 2009) | *Presenter* | *"Never Events," Payors Refusal to Pay and Industry Demand for Improved Quality*
- The American Medical Association Physician Leadership in Patient Safety Organizations (May 5, 2009) | *Speaker*
- 2009 Annual Educational Conference (April 29–May 1, 2009) | *Presenter* | *Impact of Joint Commission Standards and Recent Case Law on Negligent Credentialing Claims*
- Legal Updates in the Health Care Industry (April 23, 2009) | *Presenter*
- Patient Safety Organizations – Basics for Health Lawyers (April 22, 2009) | *Speaker*
- UHC 2009 Performance Excellence Forum: Sustaining the Art and Science of Service (March 8–10, 2009) | *Speaker*
- Patient Safety Organizations: A Practical Guide to Understanding and Implementing a PSO Program and Managing Confidentiality and Privilege Protections (February 19, 2009) | *Presenter*
- Medical Executive Committee Institute (June 6–8, 2009) | *Speaker* | *Healthcare Law: What Medical Staff Leaders Must Know to Play by the Rules and Stay Out of Trouble*
- NAMSS Annual Conference (October 11–15, 2008) | *Panelist* | *Negligent Credentialing Cases on the Rise: Are Hospitals at Greater Risk?*

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- MAMSS 2008 Fall Education Conference (September 26, 2008) | *Presenter* | *Negligent Credentialing Developments* | *Presenter, Protection of Documents*
- Kadlec Reversed: Navigating Exclusive Contracts and Employment Agreements to Ensure Physician Competency (September 24, 2008) | *Presenter*
- IHA's Leadership Summit (September 11–12, 2008) | *Speaker* | *Hot Legal Topics for Hospital Leaders*
- 24th Annual Risk Managers Meeting (September 10–12, 2008) | *Speaker* | *Negligent Credentialing Issues*
- Poliner Decision Reversed: Strategies for Effective Peer Review Processes Amid Legal Uncertainty (August 22, 2008) | *Presenter*
- Negligent Credentialing Webinar (July 22, 2008)
- Kadlec Reversed: How to Collect and Share Credentialing Data While Avoiding Legal Risk (June 4, 2008) | *Panelist*
- 2008 Annual Education Conference (May 15–16, 2008) | *Presenter* | *Health Care Law Update*
- North Carolina Association Medical Staff Services' Annual Meeting (May 7–9, 2008) | *Presenter* | *Improving Credentialing Practices and Reducing Liability Exposure After Kadlec*
- Negligent Credentialing Developments: Impact of Recent Cases and New Joint Commission Medical Staff Standards (April 16, 2008) | *Presenter*
- Illinois Hospital Association's Small and Rural Membership Meeting (March 5, 2008) | *Presenter* | *Legal Developments Affecting Small and Rural Hospitals*
- Setting the Stage for Excellence in Healthcare - Start Spreading the News! (October 3, 2007) | *Presenter* | *Improving Credentialing Practices and Reducing Liability Exposure After Kadlec* | *Presenter* | *Final Rule MS.1.20: Back to the Past*
- Performance Monitoring, Poliner, and P4P: Address Quality and Utilization While Avoiding Peer Review Litigation (September 19, 2007) | *Panelist*

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- The New Joint Commission Standards — MS.1.20 (September 5, 2007) | *Panelist*
- 2007 In-House Counsel Program and Annual Meeting (June 24–27, 2007) | *Presenter* | *New Joint Commission Standards Affecting Hospital/Physician Relations*
- Physician-Legal Issues Conference (June 22, 2007) | *Speaker* | *Hospital Counsel/Medical Staff Counsel: Conflicting Perspectives on Current Medical Staff Legal Issues*
- Annual Education Conference for the Massachusetts Association for Medical Staff Services (MAMSS) (May 31–June 1, 2007) | *Presenter* | *Impact of Kadlec on Credentialing Procedures*
- Impact of Recent Cases on Credentialing Practices and Peer Review Liability (May 23, 2007) | *Presenter* | *Impact of Recent Cases on Credentialing Practices and Peer Review Liability*
- The Challenge of Kadlec: Improving Credentialing Candor While Avoiding Legal Risk (March 15, 2007) | *Presenter*
- 17th Annual Scientific Symposium of Transcatheter Cardiovascular Therapeutics 2006 (October 22–27, 2006) | *Panelist* | *The Growing Impact of Conflict of Interest Issues on Cardiovascular Device Development and the Clinical Trial Process*
- SCORCH 2006 Program (October 13–14, 2006) | *Presenter* | *Peer Review and Performance Improvement*
- Massachusetts Association of Medical Staff Services (June 1–2, 2006) | *Presenter* | *JCAHO 2007 Changes and Challenges*