



# Strategic Advisory Council

2025 Annual Meeting

**A G E N D A**

**Driving Change Together**

**December 3, 2025**

12:00 to 2:00 p.m.

Proskauer Law Offices,  
Conference Room 2800AB  
Eleven Times Square,  
New York, NY

# Welcome SAC Members



Maria Ryan



Mark Trimmer



Paul Keel &  
Mark Nance



Kim Attanasi



Stanley Bergman



George Tysowsky



Greg Poulakos



Stephen Thorne  
Guest: Gary Pickard



Karim Khadr



Al Brennan



Wardah Inam

Guests:



Haley & Goly  
Abivardi



Linda Niessen, SAC Chair

# Moment of Remembrance for MICHAEL C. ALFANO



**“As a founding member of the Santa Fe Group, it has been wonderful for me to watch the direction the current members are taking. The Group continues to evolve with new voices and new ideas that bring new dimensions to how we think about problems and solutions. Its impact has become substantial, and I look forward to watching this evolution.”**  
Mike

# Thinking about the Future



**Stanley Bergman**

# Maintaining Momentum



MONTHLY  
PROGRESS &  
DEVELOPMENT

↕

RAPID  
RESPONSE  
OPPORTUNITIES



Environment scan.

Implications for Policy, Practice, and Education.

Inter-relatedness of areas.

Phases: Ideation, Incubation, Implementation.

**ALIGNING STRATEGIES WITH WORKGROUP PRIORITIES**

2025 SFG PORTFOLIO

- Primary Care
- COHP
- Medicare Benefit
- Technology
- Planning Convenings
- Dissemination
- Evaluation

**METRICS & FOLLOW UP**

# Maintaining Momentum: Update on SFG Activities

## POLICY

- Medically Necessary Dental Care in Medicare.....Judy Jones & Judi Haber
- Medicare Advantage Star Rating (COHP).....Zach Brian
- World Economic Forum.....Maria Ryan & David Kochman
- Discussion and Next Steps.....SAC Members

# Medical-Dental Integration

## Forging a pathway around Section 1862(a)(12)

**CMS.gov** Centers for Medicare & Medicaid Services

### Medicare Dental Coverage

#### Dental Services Integral to Medicare Covered Services

The dental services payment exclusion doesn't apply, and Medicare can pay under Part A and Part B, when dental services are [inextricably linked](#) to the clinical success of other Medicare-covered procedures or services.

A noncovered dental procedure or service is eligible for coverage in certain instances wherein, but for the provision of the dental procedure or service, a covered medical procedure or service cannot proceed or would be delayed, or, in the opinion of the treating licensed independent provider, the patient's care would be otherwise negatively compromised.

In such instances, the established clinical protocol and accepted standard of care must require dental treatment to prevent medical complications.

# Converting Medically Necessary Dental Services from Concept to Coverage

**2020:** Med Nec pathway created

**2021:** Team Biden organization

**2022:** Transplant, Cardiac, Valv., H&N

**2023:** Chemo, CAR-T, high-dose BMA

**2024:** dialysis for ESRD patients

**2025:** Team Trump organization

**2026:** *Retinopathy & Nephropathy?*

*Respiratory Conditions?*

## Adopted Conditions:

- organ transplant surgery
- cardiac valve replacement
- valvuloplasty procedures
- head & neck cancer treatment
- chemotherapy
- CAR T-cell therapy
- high-dose bone-modifying agents
- dialysis for End Stage Renal Disease

## Nomination Process:

- February 10<sup>th</sup> deadline
- medical service connection
- clinical and cost evidence
- clinical stakeholder support

# Broadening Policy Base for Oral-Systemic Health



- Oral health is closely related to overall health.
- A significant portion of the Medicare population has or is at risk for chronic health conditions, which can be further complicated by poor oral health.
- Dental issues can be early indicators of systematic diseases, such as Alzheimer's, and may also lead to severe health complications such as diabetes and cardiovascular disease, all of which have a significant impact on the Medicare population.
- If these issues were caught and managed early, many of those expenditures could be avoided.
- Medical-dental integration (MDI) activity can positively address the oral health needs of a high-risk and medically complex population by increasing access, and promoting comprehensive, continuous patient care.

# Broadening Integration of Oral Health in Primary Care

## 2026 Medicare Physician Fee Schedule Final Rule

### Medicare's Merit-Based Incentive Payment System (MIPS)

MIPS eligible clinicians that practice primary care will include an oral health risk assessment and intraoral screening as part of a patient's primary care management. The MIPS eligible clinician will provide education and counseling to the patient to include the importance of oral health and the impact of oral health on systemic diseases. For patients without a dental home and/or those with oral health needs, a dental referral will be provided.

- Include applicable oral health screening questions in the patient health intake forms (dentist of record, date of the last dental exam, and personal oral hygiene routine).
- Include intraoral health screening and referral to dental provider as part of a patient's primary care management.
- Provide education and counseling to patients about the importance of oral health and impact on systemic disease.

# Medicare Advantage Star Rating



[Click Here to Watch Video](#)

# MA INITIATIVE OVERVIEW

EMPOWERING SENIORS  
WHILE DRIVING MARKET  
ACCOUNTABILITY

The Santa Fe Group, Strategic Advisory Council  
Coalition for Oral Health Policy

Dec. 3<sup>rd</sup>, 2025



# World Economic Forum

WORLD  
ECONOMIC  
FORUM

The logo for the World Economic Forum, featuring a blue arc that curves around the text.

# Maintaining Momentum: Update on SFG Activities

## EDUCATION

- Future of AI in Dentistry.....Ron Inge
- Discussion & Next Steps.....SAC Members

# Maintaining Momentum: Update on SFG Activities

## PRACTICE

- Medical/Dental Integration.....Gary Pickard, PDS Health
- Discussion & Next Steps.....SAC Members

# Oral Health as a Pathway to Wellness and Longevity Initiative

- Goals/Purpose.....Nick Mosca & Nader Nadershahi, Co-chairs
- Discussion & Next Steps.....SAC Members

# Oral Health as a Pathway to Wellness and Longevity: A 2026 – 2028 SFG Initiative

## Intent

- Catalyze a national network to accelerate oral health integration as essential for health and wellbeing. Unite to drive innovation and scale effective models.

## Why Now

- Oral health is essential to health, equity, and the economy.
- 2026–2028 offers key opportunities for unified national action.

## Goals

- Elevate oral health as a driver of wellbeing.
- Accelerate oral and general health to achieve whole person health.
- Mobilize a sustainable, action-oriented, cross-sector network.

## Timeline

- 2025–Early 2026: Plan and engage diverse partners.
- June 2026: Host national convening; select pilot initiatives.
- 2026–2028: Launch and monitor a national action network.
- National network to advance oral health integration and wellbeing.

## Why Now

- Oral health is essential to health, equity, and the economy.
- 2026–2028 offers key opportunities for unified national action.

# Discussion & Concluding Comments



# Thank you!

[santafegroup.org/](http://santafegroup.org/)