



SOLUTIONS GUIDE
EDITION • 2026

HR COMPLIANCE • BENEFITS • WELL-BEING

Practice medicine on **your** terms.

A comprehensive HR, benefits, and well-being solution built for fiercely independent practices — without telling you how to practice medicine.

POWERED BY



Workforce platform & access to large-group benefit rates — the backbone of the Direct Practice Care solution.

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THE CASE FOR PROTECTION

Why HR Compliance matters for independent practices.

Being in business carries inherent risk. For physicians, that risk is amplified. Society has long viewed doctors as **deep pockets** — making independent practices a target for employment disputes, wage-and-hour claims, wrongful termination suits, and regulatory enforcement actions that have nothing to do with how you practice medicine and everything to do with how you run a business.

Most physicians didn't go to medical school to become HR experts, payroll administrators, or employment law specialists. **The moment you hire your first employee, you're holding all of that liability.** A single misstep — a misclassified worker, a missed tax filing, an improperly handled termination — can result in penalties, lawsuits, or regulatory action that threatens everything you've built.

THE BOTTOM LINE

HR Compliance isn't just a box to check — it's your first line of defense.

WHAT DIRECT PRACTICE CARE DOES FOR YOU

01

Simplify HR Compliance

Payroll tax filings, classification, OSHA, wage-and-hour, and state-by-state law — streamlined and defensible.

02

Reduce your exposure

Consistent, documented processes shrink your surface area — with a paper trail when it matters.

03

Employee confidence & retention

When pay, benefits, and rights are handled properly, staff stay, perform — and don't become the source of a complaint.

04

A foundation for the practice

Enterprise-level HR Compliance infrastructure, without the enterprise-level complexity.

WHY NOW

Employment regulations are more complex than ever, enforcement is increasing, and the cost of noncompliance continues to rise. **For physicians, the stakes are too high to leave HR Compliance to chance.** Direct Practice Care ensures your practice operates with confidence — fully supported, compliant, and protected from day one.

A UNIFIED SOLUTION

Built so independent practices stay independent.

Most physicians aren't losing their independence by choice — they're being pushed out by operational and economic pressures. **Direct Practice Care exists to change that.**

DPC is a unique combination of HR, health insurance, retirement, benefits, payroll, HR compliance, workforce management, and tools and resources for the well-being of physicians and healthcare professionals. We focus on reducing the undue business risk associated with fiercely independent practices, while promoting organizational and individual well-being across the whole team — **without trying to tell you how to practice medicine.**

Our services deploy quickly to close operational or strategic gaps in HR processes and teams, enabling the practice to move swiftly and stay compliant.

HOW WE DELIVER

**Rapid time-to-value**

Measured in weeks, not months — deployed without slowing the practice.

**Automation**

Speeds execution and reduces errors across payroll, benefits, and HR compliance.

**Self-service**

Modern employee experience — cuts administrative workload for your team.

**On-demand expertise**

HR augmentation when you need it — not on a quarterly retainer cadence.

THE PROMISE

Stay independent without going it alone — with one platform, one team, and one source of truth across HR, payroll, benefits, and HR compliance.

POWERED BY



The backbone that lets you stay independent.

Independent practices are built on a simple conviction: that running your own practice, on your own terms, is worth fighting for. But that independence comes with a real burden — the HR, payroll, HR compliance, and benefits administration that pulls physicians and practice managers away from what they do best.

One platform. One team. One **source of truth** across the entire employee lifecycle.



Single source of truth

All-in-one platform — consistent across the employee lifecycle.



Real-time data

Connected, automated workflows — informed people decisions.



Large-group insurance rates

AdvisorHR works with a large pool of businesses — independent practices gain access to health insurance at large-group rates, coverage typically reserved for big health systems.



HR • PAYROLL • BENEFITS

Efficiency and HR Compliance, across the whole practice.

Add more value with less redundancy, fewer errors, decreased risk, and deeper analytics. Self-service capabilities free up time to turn HR into a strategic business driver.



Human Resources

Engaging, personalized workplace experiences with anytime, anywhere access.

- New-hire reporting
- PTO and vacation accrual
- Job & salary history
- Certifications, skills & training
- Audit and HR compliance
- Document management



Payroll

Process payroll in a few clicks. Reduce the burden of tracking tax rates and liabilities.

- Real-time payroll preview
- Garnishment management
- Year-end W-2 / 1099
- Automated tax filing
- Employee & manager self-service
- Check, direct deposit, or pay card



Benefits Administration

Self-serve enrollment, with health insurance at large-group rates.

- Streamlined open enrollment
- Real-time carrier integration
- Carrier-specific reports
- Benefit-cost analysis
- Life-event wizard
- ACA HR Compliance, FSA, HSA, HRA
- COBRA · 401(k)

HR Compliance & Integration



Data Integration

Connect to GL, 401(k), and benefits carriers. Bundle includes up to **three connections of your choice** — eliminating manual benefits comms and paperwork.



Tax Filing Solutions

Integrated with payroll — eliminating multiple tax processing services, simplifying multi-location growth, and reducing errors and liability.



ACA HR Compliance

Automates measurement-period tracking and benefits enrollment / dis-enrollment. Includes **1094 / 1095 print & eFile** with the IRS on your behalf.

DEFENSIBLE BY DESIGN

Streamlined, documented, and audit-ready — the HR Compliance posture you want when something goes sideways, before it goes sideways.

TALENT ACQUISITION

Attract, hire, and onboard the very best talent.

As the future of work continues to evolve, employers must be agile in adopting the tools required to quickly attract, hire, and onboard the very best talent. Talent Acquisition conveys positive employee experience, imparts your culture and values, and realizes quick time-to-value.

65%

of HR leaders expect recruitment to be just as difficult — or more so — than prior years.

ATTRACT & HIRE

A customizable Applicant Tracking System.

Built to optimize every stage of recruiting — whether scaling quickly, sourcing remote, or reaching diverse talent.

- Company career page
- AI-powered job ad writing & candidate matching
- Access to more than 5,000 job boards
- Assessments and skills testing
- Background and reference checks
- Video interviews • Offer letters

ONBOARD & DEVELOP

Consistency from accept to departure.

Every interaction matters — from offer-accept through tenure. Ensure consistency and HR Compliance throughout.

- Custom welcome message and links
- Digital, fillable forms
- Employee acknowledgments
- HR Compliance documents
- Workflow automation
- Pending employee dashboard

Workforce Management



Time & Labor

Flexible time tracking, geofencing clocks, allocation rules, team calendar with error alerts.



Scheduling

Assign and collaborate from any device. Shift swapping, coverage dashboards, scheduler alerts.



Expense & Occurrence

OCR receipt capture, mileage and per diem tracking, payroll reimbursement, attendance pattern monitoring.

TALENT MANAGEMENT

Learn. Share. Innovate. Grow.

Stay connected, share ideas, seek feedback, and collaborate — improving productivity and boosting performance across the practice.

SHARE & PERFORM

Multi-directional employee communication.

- Collaborative feed wall and knowledge-sharing
- Pulse surveys
- Rewards and recognition
- Goal setting, 360 reviews, and performance reviews
- Nine Box talent assessment

LEARN & GROW

An end-to-end learning management system.

82% of employees say they feel engaged at work — learning opportunities are what keeps them engaged.

- 105,000+ pre-built courses
- Gamification and learning paths
- Quizzes, certifications, and custom content
- AI-powered chatbot and search
- SCORM compliant

COMPENSATION MANAGEMENT

Plan, manage, and execute the entire process.

- Automated processes with eligibility rules
- Merit increases and bonus management
- Notifications and reminders
- Automatic payroll integration
- Analytics including compa-ratio

GIVING & VOLUNTEERING

Align employees and employers around causes.

- Corporate giving and volunteering campaigns
- Automated — campaign launch through tax reporting
- Payroll integration
- Access to over 2 million non-profit organizations

AN ECOSYSTEM FOR THE WHOLE PRACTICE

Beyond HR — tools for the whole practice's well-being.

Direct Practice Care is part of a broader ecosystem of tools built around the well-being and financial health of independent physicians and their teams. **All three tools are included with the platform — a 20%+ savings vs. licensing them separately.**

THE PERSON

Direct Self Care™

A mobile platform for individual well-being — for clinicians and the staff who support them — including access to the **Well-Being Index**, invented by Mayo Clinic.

- Research-validated assessment in minutes
- Fully confidential — no individual data shared
- Aggregated, anonymized organizational insights
- Targeted, evidence-based interventions



THE FUTURE

Direct Wealth Care™

Conflict-free financial planning and wealth management resources, purpose-built for physicians — with **no financial products to sell**.

- Practice-aware financial planning frameworks
- Retirement & succession planning
- Tax-efficient investment education
- Insurance & risk-management literacy



In partnership with the Well-Being Index — invented by Mayo Clinic



Burnout doesn't stop at the physician — it cascades through the whole team. Historically, the Well-Being Index, Direct Self Care™, and Direct Wealth Care™ have been out of reach for small practices — through Direct Practice Care, **all three are included at no additional cost.**

2 in 3

Staff burnout

Practice staff reporting burnout symptoms tied to administrative load.[†]

\$500K–\$1M

Cost to replace

Estimated cost to replace a single physician.

~30%

MA turnover

Medical assistant turnover — the highest-churn role in primary care.

Basic access to all three tools is included for every member of your practice. Upgrades and expanded modules are available as **employer-paid, employee-paid, or a custom combination** — structured to fit how your practice wants to invest.

LEADERSHIP

The team behind your practice.



Brian Case CFP®

Founder & CEO

[linkedin.com/in/briankcase](https://www.linkedin.com/in/briankcase)

Married to an independent OB/GYN physician, Brian has spent 25 years improving the well-being of physicians, their teams, and their families through personal finance. Direct Practice Care is the natural evolution of that work — **a carefully assembled network of best-in-class partners, built around what independent practices actually asked for.**



Jonathan Moss MBA • FACHE • FHFMA

VP Business Development & Chief Wellness Officer

[linkedin.com/in/jonathanmoss](https://www.linkedin.com/in/jonathanmoss)

Jonathan brings nearly three decades in healthcare operations, revenue cycle, and clinician well-being. He spent 20+ years at Baystate Health, where as Director of Medical Practice Business Services he oversaw **\$190M+ in annual collections for 1,000+ providers** — ranked #1 nationally in the Vizient/AAMC billing survey. He completed Stanford's Physician Well-Being Director's Course and holds an MBA in Healthcare with Fellowship status in ACHE and HFMA.



Leslie Tester MBA

VP Client Services

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Leslie brings over two decades of healthcare operations and growth strategy experience as **the dedicated expert and liaison for Direct Practice Care through AdvisorHR's medical practice specialty division.** Her career spans physician recruiting, client services, and executive operations — including TeamHealth and ESA Medical Group. She holds an MBA in Healthcare Administration and is the go-to resource for every Direct Practice Care client.

Our Commitment

Built by people who believe in independent practice too.

01

We Care Deeply

Your practice's success is our mission.

02

We Deliver Results

Passionate about measurable outcomes.

03

We Work as One Team

Supporting each other and the practices we serve.

04

We Build Partnerships

Long-term relationships, not transactions.

THANK YOU

Thank you for the opportunity to earn your trust.
Learn more at direct-practice-care.com



SCAN TO VISIT

PRICING

Enterprise-level HR, at the rate of the **network**.

Direct Practice Care makes enterprise-level HR accessible at rates that reflect the collective strength of the AdvisorHR network. Pricing below reflects the rate made available to your organization through Direct Practice Care.

EMPOWER PLAN

Foundations.**\$95**

per employee / month

PAYROLL ADMINISTRATION

Employee self-service • Direct deposit • Pay cards • Tax filing & credits • Garnishments

HUMAN RESOURCES

Manager self-service • Employee portal • Salary & job history • Certification tracking • Audit & HR Compliance • Off-boarding • Document management

TIME AND ATTENDANCE

Time and labor • Attendance • Time clocks • Workforce scheduling

BENEFITS ADMINISTRATION

Benefit management • Benefit cost analysis • Open enrollment • ACA HR Compliance • Life event / FMLA • FSA, HSA, HRA • COBRA • 401(k)

MOST POPULAR

PINNACLE PLAN

**Foundations +
Growth.****\$115**

per employee / month

All Empower Plan services, plus:

SHARE & PERFORM

Employee surveys • Goal setting • Performance Reviews • 360 Reviews • 9-box Review • Rewards & Recognition

LEARNING MANAGEMENT

SCORM Compliant • 105,000 Video / Media Library • Social Learning • Gamification • Training Identification & Nurturing

APPLICANT TRACKING

AI-powered job ad writing and candidate matching • 5,000+ job boards • Skills Assessments • Background checks • Video interviews • Offer letters

Rates are subject to change. Pricing reflects the network rate made available through Direct Practice Care.

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PLAN COMPARISON • ADVISORHR WORKFORCE SOLUTION PACKAGES

Feature comparison across Empower & Pinnacle.

FEATURES	EMPOWER	PINNACLE
PAYROLL, TAXES & COMPLIANCE		
Dedicated Payroll Processor	✓	✓
Payroll, Taxes & Direct Deposit	✓	✓
Visa Pay Cards	✓	✓
Seamless Time & Labor Platform	✓	✓
Geofencing	✓	✓
Workforce Scheduling	✓	✓
Overtime Management	✓	✓
Wage Garnishment Payment Service	✓	✓
General Ledger Interface (GLI)	✓	✓
Local, State & Federal Tax Filing	✓	✓
Quarterly & Year-End Filing (W-2)	✓	✓
REPORTING & ADMINISTRATION		
Salary and Job History	✓	✓
Certification Tracking	✓	✓
Skills, Education & Training Tracking	✓	✓
Audit and Compliance	✓	✓
Document & SUI Management	✓	✓
Employee Self Service	✓	✓
Check Signing and Stuffing	✓	✓
Adaptive Employee Experience App	✓	✓
PTO Tracking	✓	✓

✓ Included — Not in this plan **Custom** Configurable / quoted

PLAN COMPARISON · ADVISORHR WORKFORCE SOLUTION PACKAGES

Human Resources & Benefits Administration.

FEATURES	EMPOWER	PINNACLE
HUMAN RESOURCES		
I-9 Filing & E-Verify	✓	✓
Dedicated People Support	✓	✓
Human Employment Verification	✓	✓
Employee File Auditing	✓	✓
FLSA, OSHA, ADA, ACA, EEOC HR Compliance	✓	✓
Safety Audits and Training	✓	✓
Background Checks / Drug Testing	✓	✓
Performance Review Management	✓	✓
Company Handbook	✓	✓
Management and Employee Training	✓	✓
Unemployment Claims Administration	✓	✓
State and Federal Forms Resources	✓	✓
New Hire Onboarding	✓	✓
HR Tracking & HR Trainings	✓	✓
Employment Law Support	✓	✓
HR Compliance / HR Checkups	✓	✓
Employee Relations Guidance	✓	✓
Employee Practice Liability Insurance (EPLI)	✓	✓
Employee Discipline	✓	✓
Wage & Hour Audit Assistance	✓	✓
Work Opportunity Tax Credit (WOTC)	✓	✓
BENEFITS ADMINISTRATION		
401(k) / Reporting	✓	✓
Benefit Accrual Management	✓	✓
Benefit Cost Analysis	✓	✓
Benefit Management (Open Enrollment)	✓	✓
ACA HR Compliance	✓	✓
COBRA Management	✓	✓
Health Plans	✓	✓
Benefit Books	✓	✓
Life Insurance (Guarantee, Cash Value, Term)	✓	✓
FSA · HRA · HSA	✓	✓
Accident Policy · AD&D	✓	✓
Cancer / Critical Illness · Lump Sum	✓	✓

PLAN COMPARISON • ADVISORHR WORKFORCE SOLUTION PACKAGES

Learning, Performance, Hiring & Insurance.

FEATURES	EMPOWER	PINNACLE
PEOPLE MANAGEMENT – LEARNING & PERFORMANCE		
Learning Management System (LMS)	—	✓
SCORM Compliant	—	✓
105,000+ Video / Media Library	—	✓
Social Learning	—	✓
Gamification	—	✓
Training Identification and Nurturing	—	✓
Employee Surveys	—	✓
Collaboration Tools	—	✓
Rewards & Recognition	—	✓
Goal Setting	—	✓
Performance Reviews	—	✓
360 Reviews	—	✓
9-Box Review	—	✓
Intranet	—	✓
Feedback Tools	—	✓
Employee Portal	—	✓
APPLICANT TRACKING (ATS)		
Access to Applicant Tracking System	CUSTOM	CUSTOM
DISCOUNTED BUSINESS INSURANCE		
General Liability / Commercial Property	✓	✓
Business Owners / Professional Liability	✓	✓
Workers Compensation / Data Breach	✓	✓
Commercial Umbrella / Commercial Auto	✓	✓
Surety & Bonds	✓	✓
Other Customized Insurance Solutions	✓	✓

Pricing and features subject to change. Contact us for current rates and plan details.

