

**LEISURE AND LEARN 2014  
WORKSHOP SCHEDULE, SESSION CONTENT AND FACULTY**

Workshop Times and Presenters	Workshop Title and Content
Wednesday, March 5, 2014 6:00 p.m. - 8:30 p.m. Welcome Reception	<b><i>Residence</i></b> Keith Sofka and Penelope Caragonne 79 Calle Hidalgo Ajijic, Jalisco, MX 376-766-0002 in Mexico or 866-285-0665 from the US
<b><i>Day 1 Thursday, March 6, 2014 8:00 - 2:00 p.m.</i></b>	
8:00 a.m. - 9:30 a.m. Penelope Caragonne, Ph.D.	<b><i>The Life Care Planning Toolkit and Use of the Life Care Planning Automated Formsets.</i></b>  The LCP Toolkit is a curated selection of over 9,000 peer-reviewed Open Access articles of application to life care planning. The 2014 version of the Toolkit will be given to participants on a thumb-drive for easy installation on their computers during this session. The Life Care Planning Formsets, also to be installed, are comprised of automated forms designed for use on a laptop and used when collecting data during the life care planning process. Different forms collect data during initial interviews with physicians and injured persons, during appraisal of need for case management services, or, at the point an assessment of hours of attendant care are being made. Forms are also available which structure the development of a prescription for adapted transportation, assessing the side effects of a brain injury, or determining The differences in direct and indirect costs between direct hire of an attendant vs. use of agency-based arrangements for services. Another form provides a means to “quality review” a completed life care plan. Other available forms will be also covered in this session. Another aspect of the session will install the Toolkit, provide an overview of the Toolkit, and illustrate the scope of information collected. Participants will each complete a series of literature searches using the Toolkit. Application exercises will focus on learning how to use each form.
9:30 a.m. - 10:45 a.m. Keith Sofka, ATP (Ret.)	<b><i>Housing Access: How to Make Recommendations for Adapted Housing</i></b>  This is a “rubber-on-the-road” course to give attendees the tools to gain confidence and understanding when working with architectural access issues. This course will help students develop strategies for accurate assessments of housing access needs which are specific to the individual. Students will learn how to describe modifications on a room-by-room basis, what modifications are required and why the modifications are needed by the particular individual based on the access barriers they face. A number of strategies for obtaining costs will be described.  As a part of this course, participants will visit two homes. The first is the home of a local resident who uses a wheelchair and has designed and built a completely accessible second home. The

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	<p>second home was the home used by this individual prior to using a wheelchair. Participants will be asked to recommend modifications to the unmodified home as an exercise to demonstrate understanding of access principles.</p>
<p>10:45 a.m. - 2:00 a.m. Keith Sofka, ATP (Ret.)</p>	<p><b><i>Reviewing Accessible and Inaccessible Housing in Ajjic: Making Recommendations for Adapted Housing</i></b></p> <p>This session will provide students with an opportunity to apply the materials immediately presented by touring two Ajjic village homes—one, an inaccessible home in the village of Ajjic to analyze architectural barrier to access present in the home and the second, a home designed with complete accessibility for a person with paralysis. The former resident of the home will provide participants with an overview of his dissatisfaction with aspects of the home’s architecture prior to the site visit to the home.</p> <p>Each participant will, individually, identify features of the home which constitute an access barrier for the owner, who has paralysis. They will use the information gained in the previous session to help develop recommendations for an inaccessible home for a specific individual. Attendees will also visit the individual’s current residence to see the kinds of access modifications he uses on a day-to-day basis. The last aspect of this session will support participants in identifying structural changes which can be made to existing properties, and, will focus on the scope and range of information that can be collected by a life care planner prior to consulting with an access expert.</p>
<p><b>Day 2 Friday, March 7, 2014 8:00 a.m. - 2:00 p.m.</b></p>	
<p>March 6, 2014 8:00 a.m. - 9:30 a.m. Panel Discussion led by Penelope Caragonne, Ph.D.</p>	<p><b><i>Reliable and Valid Cost Sources for Life Care Planning: A Costing Roundtable</i></b></p> <p>This roundtable discussion will be presented to provide an overview of various quantitative cost databases used by life care planners. A selection of valid, easy-to-use and reliable databases will be presented covering the following factors: costs to use the database, source of data in the database, frequency with which data is renewed, whether the database sorts by geographical area and/or zip code, ease of use, and reliability and validity issues inherent in use of the data base.</p> <p>All of the costing resources mentioned on the various Internet Forums and other locations will be collected and distributed to participants as part of the LCP Toolkit. The merits and drawbacks of each costing resource will be explored. Attention will be centered on accuracy, replicability, substantiation, and defensibility – both to challenges from opposing experts and from Daubert or other similar legal challenges.</p>
<p>9:30 a.m. - 10:45 a.m.</p>	<p><b><i>Overview of “Access Ajjic” Project</i></b></p>

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Keith Sofka, ATP (Ret.)	<p>This course will review the Americans with Disabilities Act – the Law, the Regulations, the Enforcement and the Design Standards. Participants will gain a understanding of which entities have responsibility for compliance with the provisions of the ADA. As an exercise, participants will explore the central parts of Ajijic which have been newly ramped. Participants will then work together to create an accessibility map of central Ajijic using Google Map Maker. This work will become part of an access Ajijic project which will assist individuals with disabilities. The public will be able to access the collected information directly from a Google Map of central Ajijic. Participants will help by noting the location of each ramp, each fully accessible store or restaurant, and each obstacle that would prevent wheelchair access. Using this information, an individual with a disability can plan a route to and from places of interest in Ajijic. The skills learned in this course will be valuable to planners who must consider for their client, alternative transportation needs, access to employment, and access to public places.</p>
10:45 a.m. - 1:00 p.m. Keith Sofka, ATP (Ret.)	<p><b><i>Charting Ajijic for Access</i></b></p> <p>Attendees will break into access teams and each team will review one part of the curb cuts completed in Ajijic over the past year. Meeting ADA guidelines and achieving access in the real-world can present some daunting obstacles. Photos of each access modification will be taken and recommendations made to improve access.</p>
1:00 p.m. - 2:00 p.m. Keith Sofka, ATP (Ret.)	<p><b><i>Developing an Google Access Map of Ajijic</i></b></p> <p>The photos taken above will be added to the google satellite map for Ajijic. Accessible routes will be drawn to locations of restaurants and other points of interest. This map will allow people with disabilities to chart a route to locations of their choice.</p>
<p><b>Day 3 Saturday, March 8, 2014 8:00 a.m. - 5:00 p.m.</b></p>	
8:30 a.m. - 10:00 p.m. David Dillard Reference Librarian/Subject Specialist Samuel Paley Library Temple University Library System Temple University, Philadelphia, PA	<p><b><i>Search Techniques</i></b></p> <p>These lessons will be presented the premier researcher David Dillard of Temple University’s Samuel Paley Library. This first session focuses on providing a framework for research of relevance to life care planners that can be completed on the internet. The presentation will describe guides and search engines to use when retrieving medical and legal information, effective research techniques, and search engines. The session will present methods for completing on-line searches and review databases that meet specific information needs. The outcome of this session is that of assisting life care planning experts in</p>

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	<p>learning sources for scholarly research, and, the benefits of different search engines and techniques. Participants will be asked to come to L and L 2014 with concrete examples of on-line searches they have conducted in the past, are attempting to currently conduct, to obtain assistance with those searches.</p> <p>The second session continues the first, focusing on the specific problems the students have brought to the workshop. Students will learn effective search strategies for solving the problems brought by the students. It is anticipated that this session will provide the students with an opportunity to complete, with Mr. Dillard's assistance, searches for the type of evidence-based research that can support the resources they will recommend in their life care plans.</p>
<p>10:00 a.m. to 12:00 p.m.  Gonzalo Rivera Reyes, MD  Penelope Caragonne, MS, PhD, CLCP  Michelle Neilson, CLCP  Keith Sofka, ATP (Ret.)</p>	<p><b><i>Providing Case Management services in remote areas of Mexico: no telephones, no roads, limited electricity, no stores, no doctors, no hospitals, and no suppliers</i></b></p> <p>This session will provide the details of how case management services can be implemented in remote areas of Mexico using a case recently referred to Michelle Neilson by a larger insurer. Details regarding the referral, subsequent contact with the insurer by Penelope Caragonne, Ph.D., the overview will cover negotiations with the carrier; proposals for work; Letters of Agreements; approval procedures for work and procedures; scope of work negotiated; scheduling the home visit; five hours of travel to the home, logistics of home visits to remote areas; locating a ranch area with no GPS coordinates and successive approximation, results from visit; services asserted as provided by former physician; vendor contacts, purchase and shipping of supplies to remote areas; the three discipline collaborative home visit; referrals for hospitalization and therapies; interaction and conflicts between the attending physician and other medical doctors during hospitalization; bringing in therapies to a hospital for rehabilitation; purchasing, shipping and installation of hot water, supplies, and equipment in the claimants home; interactions with the referral source, and, converting Mexican hospital bills to CPT Codes for payment.</p>
<p>10:00 a.m. - 12:00 p.m.  Keith Sofka, ATP (Ret.)</p>	<p><b><i>Wheelchairs and Seating</i></b></p> <p>Students will learn the basic steps for proper measurement of wheeled mobility needs. The workshop will focus on how to determine the correct type of seating configuration for a particular individual. This session will teach the basic objectives of an evaluation for seating and mobility--postural support, stability, and pressure distribution. The content will focus on how specific factors--presence or absence of scoliosis, presence or absence of neck control, spasticity, extreme weight, presence or absence of autonomic dysreflexia, contractures, level of paralysis, need for use of technology, use of trunk, use of arms and hands--affect</p>

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	<p>these three objectives. The new automated <i>Individual Seating and Positioning Need Form</i> will be used to determine which features affect a recommendation for wheeled mobility. Key features of both manual and power chairs will be reviewed--from different types of seating cushions, manual chairs, leg and chest straps, neck and side supports, tilt-n-space chairs, power chairs and standing frames--and how each relates to an individual's specific needs.</p>
<p>12:00 a.m. - 5:00 p.m. Movilidad Sin Límites Alberto Ruiz Bazulto Guadalajara, Mexico</p>	<p><b><i>Technology Exposition</i></b></p> <p>Movilidad sin Limites is the largest vendor of adaptive transportation in Mexico. This company will be on hand to demonstrate a selection of mobility equipment, seating equipment and a lift-equipped van. The second aspect of the session will provide students with "hands-on" opportunities to familiarize themselves with the wheeled mobility described in the preceding section. Different types of access ramps, tie-downs, rear vs. side entry vans, relative van height, centers of gravity of different vans and their effect on stability, driver controls, and safety, will be demonstrated. Three different types of manual and power wheelchairs, wheelchair cushions, tires, and controls for stability, will be available for students to test. In addition, this session will focus on the relationship between recommendations for adapted transportation, the wheelchair used by an individual, their physical capabilities, and psychosocial factors--family size, parking factors, home configuration, the terrain in which the wheelchair will be used, recreational pursuits--that influence the type of van selected for adaptation. The automated <i>Adaptive Transportation Form</i>, designed in concert with the leading St. Louis distributor of adapted vans, will be used to guide participants in collecting the type of information necessary to creating an appropriate recommendation for adapted transportation.</p>
<p>6:00 p.m. - 10:30 p.m.</p>	<p><b><i>Gran Fiesta: Botanas, Bebidas, and Bandas</i></b></p> <p>A chance to network, meet some people living at lakeside and relax.</p>
<p><b>Day 4 Sunday, March 9, 2014 9:00 a.m. to 2:00 p.m.</b></p>	
<p>9:00 a.m. - 10:00 a.m. Julia A. Finn, BSN, RN, CCM, CLCP Owner, Comprehensive Life Care Planning, LLC Network Manager, Paradigm Management Services Dayton, OH</p>	<p><b><i>Health Coverage 101</i></b></p> <p>This session focuses on medical reimbursement, where to find information, the scope and range of different types of coverage, and a comparison across types of coverage. Specific topic objectives include:</p> <ul style="list-style-type: none"> <li>What is the difference between an HMO, a PPO, and an HSA?</li> <li>Will the ACA make the HSA extinct?</li> <li>What do each of these acronyms mean?</li> <li>What is the difference between traditional Medicare, a Medicare Advantage Plan, and a Special Needs Plan?</li> <li>What's primary and secondary coverage?</li> </ul>

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	<p>How does the ACA impact the insurance industry and what happened to those plans people thought they could keep?</p> <p>Students will be taught the range of available types of coverage and reimbursement models and the corresponding regulatory issues that come to play based on the type of plan selected. The impact of different types of coverage on subrogation of Life Care Plan settlement monies, including workers compensation in dual personal injury and work injury cases, will also be covered.</p>
10:00 a.m. - 10:15 a.m.	<b>Break</b>
<p>10:15 a.m. - 11:15 a.m.  Judy Metekingi MS RN CRRN CDMS  CCM LNCC CLCP  Metekingi and Associates PLLC  Doctoral Candidate - University of Utah  Draper, Utah</p>	<p><b>Continuous Quality Improvement in Life Care Planning</b></p> <p>"Quality is never an accident. It is always the result of intelligent effort" (John Ruskin). Life Care Planners embark on a case with a written document being the final product. Typically, we assume we have done a good job when we receive more work from the same source. But how does one measure consumer satisfaction? What measures can be used to determine if the plan we have developed meets the consumer's needs? Benchmarks will be taught that can be used to ensure that our care plans meet the needs of both client and consumer audiences and ensure quality life care plan products?</p>
<p>11:15 a.m. - 12:15 p.m.  Penelope Caragonne, Ph.D., CLCP</p>	<p><b>Should Offsets Be Taken or Not Taken in Life Care Plans?</b></p> <p>This workshop will discuss the pro's and con's of using offsets in Life Care Plans. The points of view of two noted economists will provide the conceptual basis for this workshop. Participants will learn the key arguments advanced in the two peer-reviewed published articles by these authors: Roger Feldman and Karl A. Egge, "Savings Offsets in Future Care Costs for the Severely Injured: New Thoughts on an Unsettled Issue," Journal of Forensic Economics, 1997, 8(3):239-245. The opposing view is taken by Frank Tinari in "Do We Double Count Damages in Personal Injury Cases?", Journal of Legal Economics, 1995, 5(2):23-32.</p>
<p>12:15 p.m. - 1:45 p.m.  David Dillard  Reference Librarian/Subject Specialist  Samuel Paley Library  Temple University Library System  Temple University, Philadelphia, PA</p>	<p><b>Search Techniques</b></p> <p>This is part two of Mr. Dillard's presentation.</p>
1:45 p.m. - 2:00 p.m.	<b>Attendance Sheets, CEU Forms and Housekeeping</b>
2:00 p.m.	<b>Close of Workshop</b>