Caragonne and Associates, LLC
Announce the
Third Annual Leisure and Learn Workshop
February 23, 2011 to February 26, 2011
Ajijic, Jalisco Mexico

Productivity and Planning Solutions
for the
Rehab Professional/Solo Life Care Planner

1. The 21st Century Office
All You Need to Know to Work Faster and Be More Cost Efficient

2. Going into Business: Resources for the Rehab Professional/Solo Life Care Planner
An Expert Panel of Expert Support for the Expert Life Care Planner

3. 2011 Life Care Planning Toolkit
How to Install, Access and Apply to Your Work

4. Neuro-Cognitive Evaluations
Knowledgeably Requesting and Interpreting Neuro-Cognitive Reports

5. Working with a Same-Side Neuropsychological Expert
Effective Cross-Disciplinary Collaboration Techniques

6. International Life Care Planning
A Step-by-Step Guide

7. Assistive Technology and Life Care Planning
Structured Activities for Implementing Assistive Technology Assessment

8. Medicare Set-Aside
An Option for Your Practice?

9. A Comparison of Life Care Planning Models
Plan Development Methods Used by CLCP's and CNLCP'S

10. The Automated Life Care Planning Form Set
Data Collection Forms for All Phases of Life Care Planning

11. Health Care Reform
The "Mythbusters" Version

12. Increasing Skills for Deposition and Trial Testimony
A Mock Trial with a Mock Jury

CEU'S are being sought through ICHCC, CCM and Nursing Accreditation Agencies

Contact Caragonne and Associates, LLC

866-285-0665 or mail@caragonne.com
or Visit
www.caragonne.com for a copy of the brochure and registration form

All About theThird Annual

Leisure and Learn Workshop

The Leisure and Learn Venue:

The Leisure and Learn Workshop is held in the small, rural mountain village of Ajijic, Jalisco, MX. The workshop venue is spacious and distraction-free. It features up-to-date technology, no-cost Vonage connections to the United States, and Wi-Fi connections throughout. All technology to be taught is content that can be immediately practiced during the workshop. The Workshop is limited in size--by design--so one-to-one interaction and personalized teaching is matched to the needs of participants.

The Workshop Philosophy:

The Leisure and Learn Workshops are designed around several principles and beliefs. The first? That learning can best be achieved when low stress is combined with high intellectual challenge--a peaceful atmosphere free from disturbance and interruption joined with challenging, immediately usable, course content. The second? That relevant skills are more readily acquired in a small-group environment, one that is both intimate and supportive of professional development. The third? That effective learning incorporates sufficient time for information interchange and networking with one's peers. The fourth? That pre-existing expertise is enhanced when new skills and knowledge are immediately applied and practiced. And fifth: That learning is best advanced with contrast--a distraction-free and tranquil learning environment followed by novel and unique cultural experiences and exchanges. The foundation for the Leisure and Learn Workshops is comprised of these five tenets.

Workshop Results:

Today, experienced, as well as newer litigation professionals function in an increasingly competitive and complex environment. As a result, they need tools and relevant information technology to position their expert practices in the vanguard. The Leisure and Learn Workshop has been designed with these factors in mind. It provides a supportive context for learning. It assists the development of professional identity and "socialization into the field" of expert testimony by fostering long-lasting peer relationships. It provides a means for professionals to immediately apply and practice new learning. Last, it gives expert planners and other rehabilitation professionals a range of technology and content applications to aid their decision-making, and, make the most of their limited time and financial resources.

Third Annual Leisure and Learn Workshop

The Workshops in Detail

Day One

21st Century Office 3.0 Hours

Keith Sofka, ATP (Retired)
Caragonne and Associates, LLC
Ajijic, Jalisco, MX

Returning attendees will recognize this presentation as a continuation of past 21st Century Office workshops – picking up where other workshops left off and providing additional depth of material and some opportunities for hands-on use of new technology. However, the content is carefully designed so that new attendees will not feel lost or that they've missed important previous content. The technology is changing ever more rapidly and there are new devices to be considered for inclusion in a 21st Century Office. Specific topics will include: hardware compatibility across platforms, so that all of your devices will “talk” to each other; digital rights management (DRM – copy protection) and how this may affect your choice of devices; scanning documents for portability and easy searching as well as HIPAA , privacy and data encryption issues.

Going Into Business: Resources for the Solo Life Care Planner and Rehabilitation Practitioner 2.0 Hours

Penelope Caragonne, BS, MSW, Ph.D., CLCP

Going into business for the first time is daunting. While waiting for that first referral, the new practitioner must decide how and where to market. Should different marketing materials be developed for different audiences? Should the practice combine life care planning with case management or provide only life care planning services? Beyond establishing presence in the business community, decisions also need to be made on whether the business is to be local or national. Costs related to web site development must be determined. Malpractice insurance must be obtained; a template for business contracts created. Levels of compensation must be established; billing and accounting systems chosen; decisions made on the scope of accounting and legal support needed; when and how to most effectively bill clients. A separate office location versus in-home office must be considered, as is the possible impact on family members. When and how to bill clients is another area to consider.

Persons attending the Leisure and Learn Workshop had to make myriad choices as they started their consulting practices. Each possesses information about decisions they made that helped their businesses to grow, and, decisions they made they would now do differently. This session will review the range of decisions required to establish an expert consulting practice by building on the collective skills and knowledge of workshop participants. Beyond obtaining the expertise of expert consultants, participants will also receive a notebook on disc containing sample contracts, pricing structures, marketing materials, and names of cost-effective business, legal, accounting, software, logo design, insurance and other resources. This session will be in the form of a group discussion facilitated by Penelope Caragonne.

2011 Life Care Planning Toolkit (LCP) 1.0 Hour

Penelope Caragonne, BS, MSW, Ph.D., CLCP
Caragonne and Associates, LLC
Ajijic, Jalisco, MX

The LCP Toolkit session is a compact disc that contains over 4,500 articles, abstracts, and "live" links to government databases. Workshop participants will receive the Toolkit, as well as all workshop materials, already pre-installed on a 4GB Thumb Drive. The toolkit outline will be reviewed as well as new listings added to the toolkit since April 2010. Participants will be asked to complete several sample searches during this workshop session in order to familiarize themselves with use of the Toolkit. The LCP Toolkit is provided at no charge to workshop participants. In addition to the workshop materials and Toolkit, workshop participants will also receive copies of the automated computer-based LCP Form Set. The LCP Form Set will be taught in a later section of the Workshop.

Day Two

Neuro-Cognitive Evaluations: Knowledgeably Requesting and Interpreting Neuro-Cognitive Reports 2.0 Hours

Kathryn Odom, Ph.D.
Director, Neuro-Cognitive Testing
Pate Rehabilitation Center
Dallas, Texas

Life Care Planners are frequently responsible for developing life care plans or persons with acquired brain injury or stroke. Equally often, they are required to understand or to interpret neurocognitive testing results in order to better understand the needs of the person for whom a plan is being designed. Course work in life care planning does not offer planners a detailed overview of the purposes and outcomes sought from comprehensive neuro-cognitive testing, how test scores should be knowledgeably understood and interpreted, or, how to critique excellent from less than adequate testing. This course is designed to offer the life care planner an overview of all of the areas tested during a full neuropsychological battery; what the tests seek to demonstrate; what the range of results mean;

how to recognize when neuropsychological testing may have been less than usefully completed, and what minimum credentials and clinical training are required in order to perform fully adequate neuro-cognitive testing. Neuro-cognitive testing and its applicability to different types of injury will be explored, as will the circumstances under which neuro-cognitive testing should be supplemented with more specific sensory testing. Limitations of neurocognitive testing will also be reviewed. Workshop participants will receive sample neurocognitive reports as part of this workshop as well as copies of all handouts on their thumb drives.

Working with a Same-Side Neuropsychological Expert: Effective Cross-Disciplinary Collaboration 1.0 Hour

Kathryn Reid, MA, CRC, CCM
Reid Case Management, Inc.
Seattle, WA

Building on the results presented in the preceding session, this section will focus on techniques and strategies used by a life care planner to work effectively with a same-side expert in neurocognitive testing. Participants will receive samples of questions to ask and functional checklists to use when consulting with neuropsychologists. Collaboration with vocational experts will also be discussed. Case examples will illustrate responses to these inquiries and the resulting life care plan recommendations and reports.

International Life Care Planning 1.0 Hour

Keith Sofka, ATP (Retired)
Penelope Caragonne, BS, MSW, PhD, CLCP
Caragonne and Associates, LLC
Ajijic, Jalisco, MX

This course provides an overview of the types of requests attorneys make for international life care planning services–a newly expanding market. Participants will learn what information needs to be obtained from an attorney before work can be initiated. The need for and benefits of a contract with referring attorneys will be outlined. Tasks involved in researching services in a particular town, region or country will be taught, as well how to identify when US-based services cannot be obtained. The range of databases required to respond to requests for planning will be presented. Methods for identifying, locating and accessing data-based resources for nursing costs per hour, wage data by type of occupation, life expectancy, medical professionals, and costs of goods and services will be described. The course will review specific data collection challenges faced by US-based life care planners required to determine prices for good and services. Information to be collected about a country before travel (dress, customs, history, and any risks for solo female travelers) will be reviewed. The value of site visits to a locale and completion of photographs to support later testimony will be described. The means through which legally

admissible cost and insurance information can be obtained will be reviewed. Methods used to research a country's mandated insurance system will also be outlined. All handouts and links referenced will be included on the Thumb Drive provided to participants.

Assistive Technology and Life Care Planning 2.0 Hours

Keith Sofka, ATP (Retired)
Caragonne and Associates, LLC
Ajijic, Jalisco, MX
and
Valerie Knafelc, BS, MA, CCC/SLP, CLCP
Life Care Options, Inc.
Colorado Springs, CO

Attendees will participate in a structured series of activities designed to help them to realistically implement assistive technology in their Life Care Plans. These activities will enable planners to identify the kinds of assistive technology available, how this technology is applied, what training is necessary to utilize this technology, the costs associated with implementing assistive technology and the results that can be expected when using assistive technology. How to identify an individuals' functional obstacles will be taught as the primary method for specifying the appropriate assistive technology. Attendees will receive comprehensive handouts (on their flash drives) which describe available assistive technology resources nationally including resources for devices and vendors for training. This course will emphasize actual "rubber on the road" solutions for often encountered functional obstacles.

Day 3

Medicare Set-Aside: An Option for Your Practice? 2.0 Hours

Linda Nelson, CCM, CLCP, MSCC
Medical Management Resources, Inc.
Helena, Montana

Enforcement of the Medicare Secondary Act has dramatically changed the dynamics of insurance claim settlements. Worker's compensation settlements were the first to be scrutinized, followed by all liability insurance settlements. Today, virtually no insurance settlement can occur without consideration of Medicare's interests. This has resulted in increased settlements, or, in some cases, torpedoed the settlement process, as costs grew beyond the comfort level of insurance companies. Complicating the entire process is the risk of recovery leveled against insurers and attorneys alike by Medicare. Today, the focus of claim settlements requires an analysis of future medical needs and costs, clear communication with the claimant regarding their legal responsibilities and protection of all parties involved. At the end of the presentation, participants will:

- Understand the legal requirements of the Medicare Secondary Payer Act
- Understand what it means to 'consider Medicare's interests'
- Understand the differences between worker's compensation MSAs and liability MSAs
- Determine whether adding MSAs as a business product is reasonable for them
- Determine whether pursuing MSCC accreditation is reasonable for them
- Understand how MSAs complement life care plans

A Comparison of The Nursing Diagnostic Model for Life Care Planning and the Certified Life Care Planning Model 3.0 Hours

Shelly Kinney, RN, MSN, CCM, CNLCP
Kinney Consulting
Ralston, NE
and
Penelope Caragonne, BS, MSW, Ph.D., CLCP
Caragonne and Associates, LLC
Ajijic, Jalisco, MX

In deposition or at trial, a life care planning expert is often asked to defend the methods they used to develop a life care plan--why this step and not another; why this assumption and not a different one; why reliance on this data source and not a different type of data source. At times, opposing experts may use distinct and separate guiding principles for plan development. How the planning processes differ and how the assumptions that govern these processes vary, however, may not be clear to a juror.

This session is designed to fill that information gap. It provides a framework for analyzing and comparing two widely used models used in life care planning--the Nursing Process Model and the model taught as part of the Certified Life Care Planning (CLCP) process. This session is designed to educate life care planners about the similarities and differences between two models so they in turn can help jurors understand each step of the planning process used in each.

In this session, participants will learn how to compare the two models on a range of attributes. The different organizing principles behind each model--its "core concept"--will first be discussed. Instruction will next focus on how the organizing principles of each model influence client assessment processes, development of plan objectives and the scope of interventions recommended.

Instruction will next focus on how the organizing principles of each model influence client assessment and development of plan objectives. "Comprehensive assessment" as defined by each model will be addressed, as will the information collected in each model's assessment process.

Record review and inter-disciplinary collaboration will be described, along with the steps and stages that make up the remainder of plan development in each model. Participants will then compare how each model displays Cost Chart data. Plan objectives and outcomes within each model, as well as differences in how each model evaluates life care plan outcomes, will be compared and contrasted. Credentials for testifying experts will be reviewed as will the scope of admissible testimony. The research basis for each model's certification process will last be compared.

The Computer-Based Automated Life Care Planning Form Set 1.0 Hour

Penelope Caragonne, BS, MSW, PhD, CLCP
Caragonne and Associates, LLC
Ajijic, Jalisco, MX

The purpose of this session is to teach the personal computer-based Automated Life Care Planning Form Set. In Leisure and Learn Workshops 1 and 2, workshop participants requested that a set of personal computer-based set of automated forms be developed to support their work as life care planners. This session presents the results of work undertaken to develop this automated Form Set. Session members will receive the entire Form Set on their workshop Thumb Drive. The forms are all automated. For forms requiring entry of numeric values, the summed totals are calculated for the planner. All forms can be used by planners in a variety of environments: working in the field during a home visit, in-office collaboration, or telephonic client assessment. The forms to be taught are:

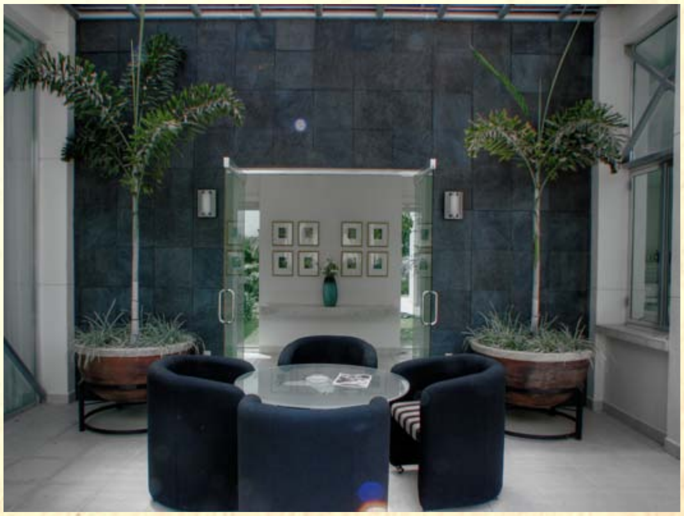
- Long-Term Planning and Client Assessment Form (Can be used by planners using either the CLCP or Nursing Process Model of life care planning)
- Case Management Levels (How to assign a high, moderate or low level of case management)
- Determination of Need (DON) Protocol (How to determine the hours of attendant care needed per month/year)
- Activities of Daily Living (ADL) Form
- Life Care Planning (LCP) Clinical Interview Checklist
- Adapted Transportation Form (How to determine specific driver modifications needed)
- Community Integration Questionnaire (Provides a measure of community isolation after disability)
- Life Care Planning (LCP) Quality Assurance Form
- Agency-Based vs Family Hire Form (How to compare both the direct and indirect costs in each method)

Day 4

(CONTINUED) The Computer-Based Automated Life Care Planning Form Set

1.0 Hour

Penelope Caragonne, BS, MSW, PhD, CLCP
Caragonne and Associates, LLC
Ajijic, Jalisco, MX



Health Care Reform:
Will the Patient Protection and Affordable Care Act Affect Your Practice?

2.0 Hours

Julia Finn, RN, CCM, CLCP
Life Care Planning
Dayton, OH

On March 23, 2010, President Obama signed comprehensive health reform, the Patient Protection and Affordable Care Act, into law. What are the implications for life care planning, case management, VICF and MSA practices?

Class will focus on key areas of interest for your practice in a non-political interactive discussion of the health care reform bill as signed into law. The bill is hundreds of pages long, one comprehensive summary contains 146 pages. Our presenter has distilled this information further and will provide you with a simple distillation of the parts of the bill most relevant to Life Care Planning. Expect some surprising “gems” that you may not have heard about.

Objectives:

Upon Completion, A Participant will

1. Have an understanding of the Patient Protection and Affordable Care Act framework.
2. Identify and understand provisions of the bill which could affect off sets when doing Medicare Set Asides and Vaccine plans.
3. Identify, understand, and discuss 3 possible implications in the bill for health care providers which could impact Life Care Plans and Case Management.

On the Hot Seat: Deposition and Trial Testimony 3.0 Hours

Steven A. Adelman, Esq.
Adelman Law Group, PLLC
Scottsdale, AZ

The testimony of any expert will generally focus on (1) your professional credentials regarding the subject of your opinions, (2) the factual foundation for your opinions, and (3) the opinions themselves. It sounds easy, but lawyers routinely complain that many experts give fumbling and unpersuasive answers in depositions and at trial. Through group discussion and examination of volunteers, this session will help you appreciate the significance of each aspect of your testimony, identify traps for the unwary, and help you advocate for your position when offering statements under oath.

Complete and return this form electronically or print the form and fill it in by hand
Please e-mail or telephone any questions you might have to: mail@caragonne.com or toll-free 866-287-0669

I. ATTENDEE INFORMATION - Please use and ink and print clearly

First Name:	Last Name:
Certifications:	Organization:
Address:	City:
State: Zip:	Telephone:
Fax:	E-Mail:

II. REGISTRATION FEES – Please complete one form per person.

☐ *I will be Attending the Workshop – from 8am, February 23rd thru 2pm, February 26th* $700.00

This includes an opening reception the evening before classes commence, a continental breakfast and a light lunch each day of the conference plus a Mexican Fiesta held the evening of Friday, February 25th.

☐ *Members in good-standing of IARP and AANLCP will receive a $100.00 discount.* ($100.00)

Plus $50.00 will be donated to IARP in the member's name.

An overnight trip will be available to the artist's town of Tlaquepaque. The trip will begin on Saturday, February 26th after class. Accommodations will be at the beautiful Quinta Don Jose, transportation from Ajijic to Quinta Don Jose and on to the airport will be included. Final cost for this trip will depend upon the number of participants.

☐ *I am interested in Attending the optional trip to Tlaquepaque starting the afternoon of February 26th –* Cost To Be Determined

Total Cost of Workshop:

☐ $700.00 Workshop Non IARP or AANLCP Member
☐ $600.00 Workshop IARP or AANLCP Member

☐ Optional Trip to Guadalajara Transportation – Costs to be determined.

III. PAYMENT – **(Please do not enclose any payment.)**

Please do not enclose any payment. When we receive your registration, we'll send you a bill via your e-mail address. This will be payable through Paypal or any major credit card. Please call if you would prefer other arrangements.

IV. ADDITIONAL INFORMATION

Special Needs:

An information packet will be sent to you via e-mail upon receipt of this form. This packet will include additional information about after Workshop activities, maps, directions for travel from the airport to your hotel, etc. If you would like assistance with lodging, flights or other logistics, please call Caragonne and Associates, LLC at 866-285-0665.

Please complete your registration by February 1, 2011.

Please return this form by e-mail to mail@caragonne.com or Fax this form to 312-803-2299 or mail this form to Penelope Caragonne, PhD., 827 Union Pacific Blvd., 071388, Laredo, TX 78045

Questions? Please call 866-285-0665 or send e-mail to: mail@caragonne.com