FSGA 2015 Conference Course Outlines

Thursday, July 23, 2015

Session 1b; 9am-1pm: Guardian Advocacy Training, Chapter 394
Bob Decker, PhD, NCC, LMHC

Course Description: The Guardian Advocate Training Course provides a 4-hour training. The training covers mental health treatment and the Baker Act, Guardian Advocates duties and responsibilities, the elements of treatment planning, mental illness and diagnosis.

Session 2a; 10-11am: Florida’s Alzheimer’s Initiative – Brain Bank Program
Edith Gendron, ADRC

Course Description: Presentation will describe purpose of program, criteria for inclusion, how to access program and overview of what we know about Alzheimer’s disease and age related dementias at this time.

Session 2b; 10-11am: Nuts and Bolts of Guardianship
Robert Dixon, PG

Course Description: Session will discuss Guardianship in practice. The presentation will help jump start a guardianship practice from inquiry to discharge. It will identify resources, marketing tips, finance through start-up, governing authorities, and best office practices.

Session 2c; 10-11am: Medicare Benefits
Betty Cunningham

Course Description: Outline of Medicare Benefits and how SHINE counseling helps the beneficiaries to understand the benefits and how they work. Discuss the choices that are available and important decisions to be made. Also, what resources are available?

Session 3a; 11am-12pm: Normal & Not-Normal Aging: Understanding the Difference
Lesley J. Vestrich

Course Description: This is a one hour workshop that will help learners recognize and understand "normal" and "not normal" aging. The learner will develop new skills to approach and cue and the ability to connect with people affected by dementia. The workshop will also address typical issues that occur from early stages of the condition, through mid-disease, and into the final care concerns that are part of the progression.

Session 3b; 11am-12pm: The Diagnosis of Dementias & State of Florida ADI Memory Disorder Clinics
Kathleen Houseweart, MBA

Course Description: The 15 State of Florida ADI Memory Clinics provides varied and unique services across the state. Participants will discuss the origins and resources developed through the ADI. Evidence based diagnostic protocols will be discussed along with the common and not so common causes of dementia.

Session 3c; 11am-12pm: Overtime and Private Duty Home Healthcare
Marc Spector, Esq.
Course Description: The Dept. of Labor (DOL) attempted to undue a regulation in 2013 that prevented overtime wages to homecare workers. The proposed rule was to go into effect in January 2015. Various associations filed suit to halt the rule. Currently on appeal this decision will have major effects on private duty home care.

**Session 4a; 12-1pm: Guardianships and Reverse Mortgage**  
Phil Stevenson, CRMP

Course Description: There are potential reverse mortgage borrowers who either have a guardian or have an invalid POA and must seek guardianship. The guidelines are very specific, and must be understood before beginning the reverse mortgage process and/or before creating or modifying a guardianship. If not structured properly, the guardian would have to go back to the courts to modify.

**Session 4b; 12-1pm: Project Lifesaver**  
Joseph Downs

Course Description: Project Lifesaver is a program designed to assist in the tracking and locating of persons with Alzheimer's and related mental dysfunction disorders such as Down's Syndrome or Autism. A personalized radio transmitter bracelet is worn by participants of this program, and with the use of the Sheriff's Aviation Unit and patrol deputies, participants are located if they should become missing.

**Session 4c; 12-1pm: How to Get the Best Long-Term Care Without Going Broke**  
Lisa Kline Goldstein, Esq.

Course Description: Overview of available government benefits. How to qualify and how they can work together. Examine new changes to the laws and look at Medicaid and VA myths.

**Session 5a; 2-3 pm: The Basics of Complementary Alternative Methods**  
Stella Husch, MSA, CTRS, CBIS

Course Description: Learn the basics about different CAM techniques such as yoga, reiki, aquatic therapy, tai chi and recreational therapy in this non-threatening environment. Understand the placement of C.A.M. within healthcare and wellness.

**Session 5b; 2-3 pm: Changing Trends in Funerals & VA Benefits**  
Phillip Weinstein

Course Description: Session will show the changing trends in funerals today and in the future together with VA Benefits.

**Session 5c; 2-3:30 pm: Guardianship 101**  
Knyvett Lee, NCG; and Michelle Hollister, Esq.

Course Description: Whether a new guardian or a service provider trying to understand the guardianship process, this class is for you! The lecture will track the "life of a guardianship" from open to close with practice highlights, management tips and real life examples. Lots of helpful hints for non-guardians to best advise your clients and their families, with a special focus on the relationship between the guardian and service providers will also be covered.
Friday, July 24, 2015

Session 7; 8:45-10:15am: Opening Plenary Session – Abuse in Later Life and Trends in Stopping It
Laura Moody, JD, MPA, BA

Course Description: This course is designed to provide elder service practitioners, guardians, lawyers, and judges a basic understanding of Florida Statutes chapter 825 which governs Elder Abuse and Neglect and the changes to the Exploitation laws that took effect October 2014.

Session 8a; 10:30-11:30am: Interested Person: A Legal Chameleon
Enrique Zamora, BCS

Course Description: Who is an interested party in a guardianship proceeding, the interplay between this term and "next of kin" & "heir at law." How the issue of standing affects guardianship litigation and other guardianship proceedings.

Session 8b; 10:30-11:30am: Effective Use of Mediations in Contested Guardianships
Gary S. Wright, Esq.

Course Description: This presentation will center mediation as an effective alternative dispute resolution process to resolve many aspects of contested guardianships, including: the selection of a guardian, care service, and family disputes.

Session 8c; 10:30-11:30am: The ABLE Act: Is it as Able as Other Tools for Special Needs Planning
Lance McKinney, Esq.

Course Description: This presentation will compare and contrast the new ABLE act as another tool for special needs planning. It also will include a review of the pending Federal rules and how states are implementing this tool.

Session 8d; 10:30-11:30am: Statewide Public Guardianship Office Program Monitoring
Amelia Milton

Course Description: Information about SPGO procedures and implementation for monitoring of public guardians, including tools, fiscal monitoring, programmatic audits, and compliance with statutes.

Session 8e; 10:30-11:30am: Deciding When Hospice is Needed
Denise S. Clark, DO

Course Description: Describe general guidelines for clinical progression of disease and to identify challenges in accessing hospice care.

Session 9a; 11:45am-12:45pm: Learn How to Deal with LTC Insurance Legal Issues Affecting Healthcare Providers
Steven M. Dunn, Esq.

Course Description: The seminar is designed to educate long-term care providers and advocates on how to properly read and understand long-term care insurance policies and present a proper and legally sustainable long-term care insurance claim. During the seminar, different crucial insurance policy provisions will be read and discussed. Additionally, there will be a discussion concerning the evolution of the law and how policies that were originally intended as home care only policies are now being utilized in assisted living facilities and
alternative senior living arrangements. Moreover, we will discuss the trends in claims handling by long-term care insurance companies with respect to claims made based on cognitive impairments; as well as the trend by long-term care insurance companies in reducing the care hours of individuals contrary to the plans of care created by providers. Finally, we will discuss how to deal with claim reductions and denials.

Session 9b; 11:45am-12:45pm: *Doing Good and Getting Paid For It*
Matthew A. Linde, Esq.

Course Description: Review Florida Probate Rules, and relevant Florida statues in chapter 393 and 744 that discuss the procedures and substantive law applied to costs and fees for guardians, court monitors, attorneys (private and court appointed) and their staff. Discussion of current unresolved issues on getting paid given the law as modified through appellate court decisions and proposed changes in Florida law and current status. Discussions of steps that can be taken in light of the current law to ensure you are paid for your services.

Session 9c; 11:45am-12:45pm: *How to Avoid and Survive an Audit*
Robert Melton, CPA, CFE

Course Description: This will summarize the newly-adopted best practices for audits by the court clerks. It will include a discussion of trusts and asset valuations, ideas and strategies for the annual accounting and inventories that minimize further audit work by the clerk's auditor.

Session 9d; 11:45am-12:45pm: *Special Needs Trusts & Guardianship*
Steven Hitchcock, JD, LLM

Course Description: An in-depth discussion of special needs trusts, their creation, application and benefit for obtaining various govt. benefit programs, with a focus on applicability in guardianship.

Session 9e; 11:45am-12:45pm: *Pitfalls to Avoid in Guardianship Practice*
Enrique Zamora, BCS

Course Description: What to avoid in guardianship practice for both the guardian and the guardian’s attorney. Topics include personal property, ethical issues, restoration, dependents of the ward, removal of the guardian, advance directives, and trusts.

Session 10a; 1:45-2:45pm: *Just the Facts: Funeral Consumer Tips & FAQs*
David Minkow, MBA

Course Description: The Florida funeral and cemetery industry operates within a regulatory environment monitored by the Division of Funeral, Cemetery and Consumer Services and the Federal Trade Commission. Many consumers are unaware of these regulations, which were established to protect them. Learn the facts and become and advocate for informed death-care consumerism.

Session 10b; 1:45-2:45pm: *Managing the Digital Assets of a Ward*
David Shulman, Esq.

Course Description: A Guardian needs to know about the new emerging area of Digital Assets and Online Accounts.

Session 10c; 1:45-2:45pm: *Investment Strategies to Survive in a Global Environment & Long-Term Care Planning for Professional Guardians*
Mark Wagner, Matthew Winter; and Virginia Barausky

Session 10d; 1:45-2:45pm: Guardians, Guns, and Gun Slinging Wards
Lance McKinney, Esq. & Philip Howard, Esq.

Course Description: This presentation will better equip the guardian who finds a ward with guns as part of their tangible personal property. It will answer how to dispose or move the guns in an appropriate and legal matter. It will touch briefly on gun safety and a Gun Trust.

Session 10e; 1:45-2:45pm: New Regulations for VA Aid and Attendance
Emma Hemness, Elder Law Expert

Course Description: On January 23, 2015, the Dept. of Veterans Affairs proposed new regulations which, when final, will dramatically affect current, and future, recipients of the benefit known as VA Aid and Attendance. Many veterans and widows, unaware of these upcoming changes could make innocent mistakes which cannot be corrected.

Session 11; 3-4:30pm: Plenary Session – Everything You’ve Always Wanted to Ask: A Florida Clerk of Court Panel
Sharon Bock, Esq.; Ken Burke, CPA; Scott Ellis; Stacy Butterfield, CPA; Anthony Palmieri, JD, CIA, CCSA; Bob Melton, CPA, CIA, CFE, CIG; Lita McHugh, CPA, CIG; Hector Collazo, CIG, CFE

Course Description: The constitutionally elected clerks from Palm Beach, Pinellas, Polk, and Brevard counties will discuss their statutory duty to audit and investigate guardianships. Discover why Florida leads the nation. Learn to avoid an audit and develop partnerships with you clerk's office. Clerk staff from a variety of other Florida counties will participate too.

Saturday, July 25, 2015

Session 12; 8-9am: Opening Plenary Session: The Conversation Project in Central Florida
Sandra Yochem, RN & Judith Tinvan, RN-BC, MA

Course Description: Introduction to The Conversation Project in Central Florida is an hour long course for professionals working with individuals and families who wish to ensure that their wishes for end of life care are expressed and respected. This course provides a history of the national and local grassroots public engagement campaign that offers solutions to the issues created when advance directives are not discussed, legally documented, and shared with loved ones and medical providers. A review of physical, emotional and spiritual challenges at the end of life is included to facilitate utilization of helpful tools for professional and families who desire to have The Conversation.

Session 13a; 9:15-10:15am: Do I Have to Share That With Them, Really? Confidentiality, Interested Parties, and Third Parties
Harry T. Hackney, JD

Course Description: We will explore the statues and laws surrounding confidentiality as they apply to guardians. We will also take a look at confidentiality and privilege as it applies to litigation. Who is entitled to information and what information are they entitled to and when?
Session 13b; 9:15-10:15am: *Making Sense of Outcomes in Home Care*
Scott S. Harp, PT, PhD, DPT

Course Description: Brief review of the importance of measuring outcomes in home care. Provide review of three areas for outcomes in home care: cognition, cardiopulmonary, and balance. Demonstration of a few of the outcome tests will be given with a time for discussion of each outcome measure.

Session 13c; 9:15-10:15am: *Reverse Mortgages*
J.D. Dinnocenzo, CSA, CMP

Course Description: More and more seniors are facing financial challenges as the cost of living continues to rise and their income remains constant. Reverse mortgages can be a viable option to help fund health care cost for seniors who wish to remain in their homes. Learn how reverse mortgages work and the benefits that this unique mortgage product can provide to senior homeowners.

Session 13d; 9:15-10:15am: *Fiduciary Responsibility and Federal Income Tax*
Khadija Zackria, CPA

Course Description: A guardian, in his/her fiduciary capacity, can be held personally liable for the ward's unpaid tax liabilities. This presentation will attempt to cover what every guardian should know and do when they take on this responsibility as it relates to federal income tax.

Session 14a; 10:30-11:30am: *Eldercare Coordinator – New Option*
Cathy F. Bowers, CP, CSA, MSA, NCG; and Michelle Hollister, Esq.

Course Description: Inform FSGA about the progress of the task force and advisory committee who was charged with developing "elderly coordination" as a dispute resolution option specifically for those high conflict guardianship and mental health class.

Session 14b; 10:30-11:30am: *You’ve Been Hacked: Calamities & Guardians*
Lennie Burke, NCG

Course Description: Many things could interfere with the ability of a guardian to do their job. Natural and man-made disasters, illness and incapacity can happen. What is the guardian's responsibility to be prepared?

Session 14c; 10:30-11:30am: *Psychotropics and the Elderly*
Beth Halprin, RN, BSN

Course Description: This presentation will discuss behaviors requiring the need for psychotropic medications. It will review different types of medication frequently prescribed, possible side effects and recommended doses specific to the elderly.

Session 14d; 10:30-11:30am: *Straight Talk about Elder Financial Abuse: Best Practices in Prevention & Communication*
Claire McDonnell; and Matt Paxton

Course Description: Elder financial abuse costs older Americans $36 billion dollars annually. Guardians uniquely positioned to address exploitation. This expert panel, featuring Matt Paxton of TV's hoarders, will focus on recognizing and preventing abuse communicating clearly and respectfully with vulnerable seniors and their families.
Session 14e; 10:30-11:30am: How to Meet Your Statutory Responsibility to Enhance Your Client’s Capacity
Karen Campbell, Esq; and Melinda Coulter

Course Description: This presentation will include new materials and concepts, which you can begin using immediately, whether you are a guardian, attorney, judge or examining committee member. A manual for legal professionals entitled Developing Abilities and Restoring Rights will be introduced with an in-depth discussion of a Progressive Rights Restoration Plan.

Session 15; 1-2pm: Plenary Session – Behavior Analysis in Conjunction with Cognitive Therapy and Related Services
Vanessa M. Bracero, MS, BCBA; and Tammy V. Nieves, MA, CCC-SUP

Course Description: This presentation will help the audience learn how to understand where noncompliance to treatment stems from at times. They will learn how to use some positive strategies to implement that will increase compliance and participation rehabilitation plan.

Session 16a; 2:15-3:15pm: Geriatric Substance Abuse
H. Vicki Brail, LCSW, CCM, CDMS, GCM, PG

Course Description: Geriatric substance abuse presentation will allow the guardian to recognize, assess and develop a treatment plan for helping wards with long-term abuse or newly activated addictions to remain functional and healthy.

Session 16b; 2:15-3:15pm: The Four Ways to Fund Long Term Care (And What Are All These Legal Documents)?
Tom Willoughby, JD; and Dougal B. Leitch, Esq.

Course Description: Shows two effective ways to self-fund LTC and two ways to qualify for and receive government benefits. Also ties in legal documents needed to help qualify for benefits.

Session 16c; 2:15-3:15pm: Ethical Challenges in End of Life Care for Dementia Patients
Gary Miller, MD

Course Description: This presentation will discuss predicting prognosis and the ethical dilemmas in end stage dementia patients.

Session 16d; 2:15-3:15pm: Rethinking Technology in the Role of Guardianship – Making Technology Work For You
Laura Elder

Course Description: Make Technology work for you using industry specific software to simplify and standardize, document, and evaluate your programs, processes, and outcomes. Consider fit, cost, learning curve, and leading technology options. Learn what questions to ask to find the right tools and the right company to move your business forward.

Session 16e; 2:15-3:15pm: Trusts – Maximizing Benefits While Minimizing Costs
Nick Barton

Course Description: Over one million seniors and disabled people in Florida need Medicaid to reduce medical, medication, and nursing home costs. A Pooled Special Needs Trust is one method to lower countable income
and or assets to qualify for most Medicaid services. Among other benefits, those given full Medicaid status can reduce medications to an affordable level with no donut hole, no look back period, and no spend down of assets.

Session 17a; 3:30-5pm: **Behavior Related to Brain Injury**  
Debbie Coleman

Course Description: An interactive and fun presentation to learn and understand a client with a brain injury and the importance of proper treatment and support for the families.

Session 17b; 3:30-5pm: **Whose Life is it Anyway?**  
Glenn Krasny, NCG

Course Description: Utilizing communication and improvisation techniques to assist in caregiving for patients with dementia.

Session 17c; 3:30-5pm: **Provider Support and Distress: Ethical Dilemmas**  
Russell Hilliard, PhD, LCSW, LCAT, MT-BC, CHRC

Course Description: With advances in medicine, healthcare providers experience increased moral distress when pressured to treat beyond futility. This concept of moral distress is the most prevalent cause of burnout and nursing staff lack of retention. By reviewing core ethical principles and a unique approach to resolving ethical dilemmas, participants will be equipped to help balance ethical dilemmas and uphold ethical standards.

Session 17d; 3:30-5pm: **Caring for Someone with Alzheimer’s Disease and Dementia**  
Tino Negri, CAEd; and Allison Negri, CAEd

Course Description: The presentation is designed to offer real world practical tips on how to care for your loved one suffering from Alzheimer’s or dementia. The presentation will include understanding the skills required to respond to certain behaviors and role-playing of specific behavior scenarios, ensuring positive outcomes.