



34TH ANNUAL FORUM ON AGING

MARCH 10 & 11, 2020

SHARONVILLE CONVENTION CENTER

CONFERENCE KEYNOTES & WORKSHOPS

Tuesday, March 10, 2020 AM Intensive Workshop 1—4 (8:30-11:30 AM)

(Participants will select one AM Intensive workshop from the following)

Intensive Workshop 1: Ethical Issues in Case Management with Vulnerable Individuals

Speaker: *Paula Markey Taliaferro, MGS, LSW; Education Consultant in Aging and Outreach Specialist, Central Ohio Area Agency on Aging*

Workshop Description:

Professionals who work in the area of case management are often in a unique position. They balance the real needs of individuals and families with access to limited resources and services. Often they are the ones who are handling, first hand, complicated situations with vulnerable individuals and families. There is no roadmap that outlines exactly what to do in these situations. Case managers can find themselves in a gray area of ethical issues regarding risk, competency, decision-making and intervention. We also live in a world which is very concerned about liability if there is danger or injury to a person or group.

This session looks at case management in situations that involve balancing risk, access to resources, confidentiality, end of life concerns, boundaries and social media. It presents a framework for making ethical decisions for case managers in these situations.

Workshop Objectives:

- Participants will be able to describe the ethical issues surrounding intervention in a manner that causes the least amount of harm and the highest quality of life.
- Participants will be able to describe the ethical issues surrounding risk and safety of vulnerable individuals and propose a framework for making decisions that respects personal choice and avoidance of liability.
- Participants will be able to describe the ethical issues surrounding confidentiality of vulnerable individuals and propose a framework for making decisions that respects privacy and avoidance of injury.
- Participants will be able to discuss ethical issues and strategies for establishing and maintaining appropriate boundaries in the areas of disclosure of personal information, handling violations of personal space and balancing social media.

Intensive Workshop 2: Medicaid...It's Complicated!

Speakers: *Dennison Keller, JD; Elder Law Attorney, The Law Practice of Dennison Keller and Norrie Loomis, BSW; Medicaid Coordinator, The Law Practice of Dennison Keller*

Workshop Description:

Medicaid and the various components of the program can be complicated. Learn about the details of the Medicaid public assistance benefits and how various family scenarios play out in the process, from a legal and social work perspective. We will use a variety of challenging cases as examples and discuss some of the possible ways to resolve issues within the boundaries of the program eligibility guidelines and the law. Such cases will include families running out of money for care, gifting within the family within the 5 year look-back period, blended families and more.

Workshop Objectives:

- Participants will be able to understand the key powers needed in financial power of attorney when executing a Medicaid plan.
- Participants will be able to discuss the Medicaid program basic requirements.
- Participants will be able to learn about various strategies and techniques for Medicaid planning and compliance.
- Participants will be able to discuss case summaries of challenging family and legal situations which can de-rail or delay the Medicaid process.

Intensive Workshop 3: Social Security: Yearly Updates and Medicare Basics and Beyond

Speakers: *Kelly Draggoo, Public Affairs Specialist, Social Security Administration and Mary Leep-Pichert Ohio Senior Health Insurance Information Program (OSHIIP) Certified Trainer, Ohio Department of Insurance*

Workshop Description:

Cincinnati Public Affairs Specialist Kelly Draggoo will present information about creating a mySocial Security account online, how it works and the benefits of the account. She will also discuss options for retirement benefits, including spouse and survivor benefits. Topics will include early vs. delayed filing, work limits, and non-FICA pension interaction with Social Security. During her second hour, Kelly will discuss the different disability programs at Social Security Administration and detail the differences between Social Security Disability and Supplemental Security Income. Kelly will also demonstrate how to file for benefits via telephone, in-office and online.

The third hour of this presentation will be dedicated to everything related to Medicare. Mary Leep Pichert, OSHIIP Community liaison, will offer her expertise with Medicare and provide information about enrollment periods, eligibility criteria, advantage and supplemental plans, part D coverage and extra help, penalties for late filing and more.

Workshop Objectives:

- Participants will understand how to create and understand the benefits of a mySocial Security account.
- Participants will understand options for retirement benefits, such as early versus delayed filing, work limits, and non-FICA pension interaction with Social Security.
- Participants will gain awareness of disability program criteria and explain the difference between Social Security Disability insurance and Supplemental Security income.
- Participants will understand Medicare enrollment, eligibility criteria, advantage and supplemental plans, Part D coverage and Extra Help, and penalties for late filing.

Intensive Workshop 4: Conducting Safe Home Visits

Speaker: *Rita Rizzo, Principal, Rizzo & Associates LLC*

Workshop Description:

Are you a home visitor for a social service agency? Do you know how to keep yourself and your client safe during your visit? One in four workers will be attacked, harassed or threatened on the job; yet workplace violence is preventable. Because episodes of violence are hard to predict, it is advisable for all workers to possess skills in detecting potentially disruptive situations and defusing them. This seminar will present both organizational and individual strategies that can be implemented in social service settings to curtail violent episodes. The Violence Cycle, when and how to interrupt it, will be discussed. Come prepared to tell your own "war stories" and increase the skills and knowledge you need to keep yourself and others be safe at work. Leave knowing how to keep yourself safe during home visits, and how to prevent yourself from becoming a victim of crime.

Workshop Objectives:

- Participants will be able to assess their work environment for unsafe conditions through the use of threat assessment guidelines.
- Participants will be able to detect 14 warning signs of impending workplace violence.
- Participants will know how to spot and counteract safety threats while visiting clients in their homes & neighborhoods.
- Participants will be able to recognize signs of escalating situations and respond with a four step verbal de-escalation process to interrupt the Violence Cycle.
- Participants will know four self-defense moves that will aid in fending off attackers.

Tuesday, March 10, 2020 - Keynote 12:45-1:45 PM

Tuesday Opening Keynote - Impact of Physical, Mental, and Social Activity on Cognitive Aging

Keynote Speaker: Amy Jak, Ph.D.

Keynote Description:

Dr. Jak will explore the connection between lifestyle factors: such as exercise, cognitively stimulating activities and social connection on cognitive functioning and brain changes over time. She will provide detailed scientific support for the best ways to improve neurocognitive disorders and reduce risk for cognitive decline over time. This session will deliver an understanding of practical recommendations regarding use of physical activity, cognitively stimulating activities and other lifestyle factors to maintain or improve cognitive functioning.

Keynote Objectives:

- Attendees will have a better understanding of the current research support for behavioral interventions for mild neurocognitive disorders
- Attendees will be able to summarize strategies shown to reduce risk for cognitive decline with aging.
- Attendees will be able to provide practical recommendations regarding use of physical activity, cognitively stimulating activities, and other lifestyle factors to maintain or improve cognitive functioning.

Amy Jak, PhD is a clinical neuropsychologist specializing in disorders of aging as well as traumatic brain injury. She earned her undergraduate degree in psychology from Miami University and her Ph.D. in clinical psychology from the University of Cincinnati. She is currently a staff neuropsychologist and Director of the Cognitive Rehabilitation Clinic at the VA San Diego Healthcare system where she provides neuropsychological assessment as well as psychoeducation and training in compensatory strategies to Veterans with mild cognitive disorders. She is also an Associate Professor of Psychiatry at the University of California, San Diego (UCSD). Dr. Jak's research interests are in cognitive aging and mild cognitive impairment. Her work has been funded by VA, DoD, NIA, and/or the Alzheimer's Association since 2007.

Tuesday, March 10, 2020 PM Workshop 1—4 (2:00-4:00 PM)

(Participants will select one PM workshop from the following)

PM Workshop 1: Managing Challenging Behaviors in Older Adults with Cognitive Impairment

Speaker: Amy Jak, PhD, Director of the Cognitive Rehabilitation Clinic, VA San Diego Healthcare

Workshop Description:

In this interactive workshop Dr. Jak will discuss the different types of challenging behaviors patients with dementia may develop. Dr. Jak will detail the origins of difficult behaviors (e.g., wandering, impulsivity) and present potential strategies to respond to these situations. Self-care for caregivers will also be discussed.

Workshop Objectives:

- Attendees will have a better understanding of the brain changes underlying challenging behaviors in those with cognitive impairment.
- Attendees will be able to summarize potential strategies to mitigate challenging behaviors.
- Attendees will be able to provide practical recommendations regarding self-care for caregivers.

PM Workshop 2: Integrating Policy, Research, and Practice to Support Caregiving Families

Speakers: *Jennifer Heston-Mullins, PhD, LISW, Research Scholar, Miami University's Scripps Gerontology Center and Abby Hermes, Graduate Student, Master of Gerontological Studies, Miami University*

Workshop Description:

Family and friend caregivers are often instrumental to an older person's ability to remain in the setting of his or her choice when experiencing functional and cognitive challenges. In recent years, caregiving has received increased attention in policy and research, resulting in innovative tools and programs that may be helpful to professionals who practice with older people and families. In this interactive session, participants will learn about current federal, state, and local initiatives aimed at caregivers; available research and data to enhance direct practice with older people and their supports; and strategies that address the unique needs and practice challenges of caregiving families.

Workshop Objectives:

- Participants will be able to describe current local, state, and federal initiatives to support family and friend caregivers.
- Participants will be able to access sources for current caregiving research and data.
- Participants will be able to identify needs and practice challenges related to working with caregiving families
- Participants will be able to utilize available strategies to support caregiving families.

PM Workshop 3: Traumatic Brain Injury, Aging and Disability

Speakers: *John D. Corrigan, PhD, Professor, Department of Physical Medicine and Rehabilitation, Ohio State University and Director of the Ohio Brain Injury Program and Monica Lichi, MS, MBA, Program Director, Ohio Valley Center for Brain Injury Prevention and Rehabilitation, Ohio State University*

Workshop Description:

This presentation is intended for healthcare professionals who are working with older adults and persons with a disability and want to learn about traumatic brain injury (TBI), why it is important to know a client's lifetime history of TBI, how neurological impairments could interfere with treatment and suggestions for adapting their communication and treatment planning to accommodate those impairments.

Workshop Objectives:

- Participants will be able to describe why traumatic brain injury (TBI) affects the services they provide to older adults and adults with disabilities.
- Participants will be able to conduct screening for lifetime history of TBI.
- Participants will be able to use reference materials to accommodate impairments due to TBI in their interactions with clients and treatment planning.

PM Workshop 4: Medicare Outpatient Observation Notice Overview.

Speakers: *Matthew Barnes, JD, Staff Attorney, Pro Seniors and Michelle Frigault, LISW-S, Social Work Team Lead, The Christ Hospital*

Workshop Description:

Join this session for an understanding of Medicare Outpatient Observation Notice. The session will start with a brief overview of Medicare Part A and Part B benefits and how they are impacted by outpatient and inpatient definitions under Medicare. In addition, the requirement to provide beneficiaries with a notice when they are deemed an outpatient by a hospital will be discussed. This workshop will also provide the protocol on Medicare Observation Status at a local hospital - how they decide when to place a patient on observation status vs inpatient, who notifies the patient and the hospital procedure for this notice.

Workshop Objectives:

- Participants will be able to understand the basics of Medicare Part A & B benefits.
- Participants will be able to understand the difference between inpatient and outpatient designation.
- Participants will be able to understand the requirements of providing a Medicare outpatient observation notice.
- Participants will be able to understand a local hospital protocol on Medicare Observation Status, inpatient versus observation status.
- Participants will be able to understand how a local hospital notifies patients and the procedure for this notice.

Wednesday, March 11, 2020 - Keynote 8:30 – 9:30 AM

Wednesday AM Keynote - Inside the Mind of Alzheimer's

Keynote Presenter: Greg O'Brien

Keynote Description:

Join veteran journalist Greg O'Brien for his talk about his internationally award-winning book, *On Pluto: Inside the Mind of Alzheimer's*. Mr. O'Brien lost his maternal grandfather, mother and paternal uncles to Alzheimer's, and before his father's death, his dad, too, was diagnosed with dementia. Now Alzheimer's has come for O'Brien, diagnosed several years ago with Early Onset Alzheimer's; (he also carried the Alzheimer's marker gene, APOE-4.) *On Pluto* is the first book written by an investigative reporter embedded inside the mind of Alzheimer's, chronicling the progression of his own disease.

Keynote Objectives:

- Participants will be able to understand strategies for living and coping with Alzheimer's and other forms of dementia.
- Participants will be able to understand the role of pharmaceuticals and medical experts in finding a cure; prognosis of a cure, what does that look like.
- Participants will be able to understand the importance of sleep, exercise of body and mind, diet, learning new skills, fighting against withdrawal.
- Participants will be able to understand the need for greater funding for research; critical importance for bipartisan support for this on Capitol Hill.

Greg O'Brien is award-winning career journalist. He has more than 40 years of newspaper and magazine experience, regionally and nationally, as a writer, editor, investigative reporter, and publisher.

Over the years, O'Brien has contributed to many publications including: Huffington Post, Psychology Today, Associated Press, UPI, USA Today, Washington Post, Chicago Tribune, Denver Post, The Arizona Republic, Runner's World, Reader's Digest, Boston Herald American, Boston Herald, Boston Metro, New York Metro, Philadelphia Metro, The Providence Journal, Cape Cod Times, Boston Irish Reporter, and Boston Magazine, in addition to contributions to National Public

Radio (NPR), PBS/NOVA, and other national media, including CBS News, NBC news, and Fox News. O'Brien is the author/editor of several books, and over the years has published more than a dozen books by other authors.

O'Brien also is a board member of the distinguished UsAgainstAlzheimer's in Washington, DC, is an advocate for the Cure Alzheimer's Fund of Boston, and has served on the national Alzheimer's Association Early Onset Advisory Board, headquartered in Chicago.

Wednesday, March 11, 2020 AM Workshop 1—4 (9:45-11:45 AM)

(Participants will select one AM workshop from the following)

AM Workshop 1: Understanding of Palliative Care and more

Speakers: *Richard Sternberg, MD, Medical Director, Hospice of Southwest Ohio and CareBridge Palliative Care and Karla Walden MSN, RN, ARNP, FNP-BC, Family Nurse Practitioner, Hospice of Southwest Ohio and CareBridge Palliative Care*

Workshop Description:

Join this workshop for a focus on the principles of palliative care. Participants will gain an understanding of palliative and hospice care and how to use these principles across care settings to provide quality care. In addition, the workshop will provide a discussion aspect of assessing physiological, psychological, spiritual and social domains of quality of life for patients and families facing a life-threatening illness or event. Additionally, this workshop features a discussion on the difference of palliative care verse hospice.

Workshop Objectives:

- Participants will be able to recognize changes in population demographics, healthcare economics and service delivery that necessitate improved professional preparation for palliative care.
- Participants will be able to understand the philosophy and principles of hospice and palliative care that can be integrated across settings to effect quality care at the end of life.
- Participants will be able to identify the need for collaboration with the interdisciplinary team members while implementing the nursing role in palliative care.
- Participants will be able to discuss aspects of assessing physiological, psychological, spiritual and social domains of quality of life for patients and families facing a life-threatening illness or event.
- Participants will be able to describe the role of the nurse and other team members in providing quality palliative care for patients across their lifespan.

AM Workshop 2: Lessons Learned from Implementing an Evidenced-based, Person-centered Communication Tool

Speakers: *Katy Abbott Ph.D; Assistant Professor of Gerontology and Scripps Gerontology Center Research Fellow, Miami University and Morgan Liddic, MGS, PELI-Can Project Manager, Miami University*

Workshop Description:

Participants will be introduced to the evidenced-based Preferences for Everyday Living Inventory (PELI) and learn how to implement Preferences for Activity and Leisure (PAL) Cards, a novel communication intervention to enhance preference-based, person-centered care. Findings from a state-wide Quality Improvement Project with 35 providers will be discussed; practical tips and benefits to residents, staff, and family will be provided; and the step-by-step PAL Card implementation tip sheet will be reviewed. Participants will have the opportunity to practice using the PAL Card materials and leave this session with access to the resources needed for implementation in their communities.

Workshop Objectives:

- Participants will be able to provide background information on the PELI and the development of the PAL Card intervention.

- Participants will be able to discuss the experiences and strategies learned from other providers implementing PAL Cards in their community.
- Participants will be able to provide step-by-step instruction on how to implement PAL Cards and discuss best practices for conducting PELI/PAL interviews.

AM Workshop 3: The Impact of Healthy Lifestyles and Preventive Care

Speakers: *Anna Joan Schweikert MD, Geriatric Medicine Fellow, University of Cincinnati Amanda Arnold, MD Geriatric Medicine Fellow, University of Cincinnati and Nicole P. Soria, MD, Geriatric Medicine Fellow, University of Cincinnati*

Workshop Description:

Join this workshop for an understanding on the importance of preventive care and the utilization of healthcare. In addition, a discussion on lifestyle changes for preventive care. Furthermore, the presenters will discuss on the impact of an interdisciplinary team and the benefits on a patient's health.

Workshop Objectives:

- Participants will be able to understand the importance of preventative care in avoiding unnecessary ER visits.
- Participants will be able to discuss recommendations around lifestyle changes.
- Participants will be able to recognize the impact each interdisciplinary team member can have on a patient's health.
- Participants will be able to plan for how to provide a safe transition of care for patients.

AM Workshop 4: Health Care Fraud and Ohio's opioid epidemic

Speakers: *Thomas Synan Jr, Police Chief, City of Newtown and Greg Haines, Special Agent Supervisor, Medicaid Fraud Control Unit, Ohio Attorney General's Health Care Fraud Section*

Workshop Description:

From traditional "pill mills" to fraud in drug treatment, this presentation will look at how Ohio's opioid epidemic has influenced health care fraud investigations. This session will highlight the role of the Ohio Medicaid Fraud Control Unit in combatting the opioid epidemic and include case studies, best practices, and lessons learned. In addition, Chief Synan, founder of the Hamilton County Heroin Coalition will address client and family members addictions, identify signs, safety protocol, reversing overdose and address the emotions about family addiction.

Workshop Objectives:

- Participants will be able to understand and identify the opioid epidemic's effects on health care fraud investigations.
 - Participants will be able to identify signs of addiction in clients and family members and teach clients to identify signs of addiction in family members.
 - Participants will be able to implement safety protocols and access resources in case of family addiction
 - Participants will be able to educate clients on reversing overdose.
 - Participants will be able to coach clients through emotions about family addiction.
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Wednesday, March 11, 2020 Keynote 1:00 – 2:00 PM

Wednesday Closing Keynote - If I had a Magic Wand...

Keynote Presenter: Dawn Gross, MD, PhD

Keynote Description:

Join Dr. Gross for this keynote where she will teach us how to initiate and facilitate un-intimidating and highly productive advance care planning conversations.

What do a stethoscope and magic wand have in common? Both listen carefully to the heart. The first time Dr. Gross offered a magic wand, asking her terminally ill patient what they wished for, she was stunned to discover it was not to be cured. When caring for critically ill patients, fear can stop us from asking the questions that really matter. However, by breaking from the usual medical dialogue and simply asking what people wish, we may discover we have gifts to offer more powerful than any medicine or surgical procedure. Perhaps then, the stethoscope can become a wand. When auscultation reveals sacred stories as well as second heart sounds, providing healthcare centered on making wishes come true is nothing short of...magic.

Keynote Objectives:

- Attendees will be able to distinguish between medically oriented conversations and person/life-oriented goals of care conversations.
- Attendees will be able to engage in goals of care conversations that focus on life wishes.
- Attendees will be able to introduce and begin goals of care conversations with confidence.

Dawn Gross, MD. PhD. is a palliative medicine physician dedicated to transforming end-of-life conversations. Earning her BA from USC and a combined MD and PhD from Tufts University School of Medicine, Dawn completed her residency in Internal Medicine at Tufts, followed by fellowship training in Hematology and Bone Marrow Transplant at Stanford and post-doctoral research at UCSF.

Considered a national thought leader on end-of-life care, her work has been featured in Science, JAMA and the New York Times. An invited speaker nationally and internationally, Dawn founded a first-of-its-kind live, call-in radio program, Dying To Talk, produced at San Francisco's National Public Radio station.

Wednesday, March 11, 2020 PM Workshop 1—4 (2:15-4:15 PM)

(Participants will select one PM workshop from the following)

PM Workshop 1: Talking About the Elephant in the Room: How to Skillfully Engage in End of Life Conversations

Speakers: *Dawn M. Gross, MD, PhD, Hospice and Palliative medicine physician, University of California, San Francisco and co-founder/ CEO, Dyalogues and Paul Puccinelli, LMFT, Paul Puccinelli, LMFT, Licensed Therapist and Co-Founder of Dyalogues*

Workshop Description:

Ensuring we live life fully through our final exhale requires having conversations that are often perceived as difficult or taboo. Yet, when we begin to talk about what matters at the end of life, we quickly learn that what we are actually talking about is what matters most in life. Healthcare workers of all disciplines often find themselves caught in the midst of life-altering health transitions. By learning how to easily clarify, advocate and align medical services to support patients and their families the way they wish, all healthcare workers can ensure that the care that matters is the only thing delivered.

Workshop Objectives:

- Attendees will be able to distinguish between advance care planning and goals of care conversations.
- Attendees will be able to initiate advance care planning conversations at any stage of life.
- Attendees will be able to focus advance care planning conversations on values versus interventions.

PM Workshop 2: Not Our Grandma Seniors: Working with Senior who have co-occurring Mental Health, Substance Use and Dementias

Speaker: *Cheryl Bolender, LSW, Senior Manager and Clinical Services Supervisor, Cincinnati Area Senior Services*

Workshop Description:

This workshop will explore the issues related to the aging population living with severe and persistent mental illnesses. Often due to age related cognitive decline or dementia present behavioral challenges to the systems of care in providing services.

Workshop Objectives:

- Participants will be able to identify the four major categories of mental health disorders.
- Participants will be able to discuss the data on the occurrence of Dementia in individuals living with Severe and Persistent Mental Illnesses (SPMI).
- Participants will be able to apply ideas on “What I can Do to Help” to the behavioral plan of individuals living with SPMI.

PM Workshop 3: Pharmacogenomics and the Future of Personalized Medicine -

Speaker: *Cathy Rosenburg, PhD, Founder & CEO, Rx Integrative Solutions*

Workshop Description:

Personalized medicine is here. Pharmacogenomic testing is already improving the face of how medications are prescribed to people with chronic illness. Benefits include fewer medication-related side effects and more customized therapy based on your own genetic data, that ultimately saves you money. This course will review the practical elements of ‘genomic testing’ and describe how a patient’s genetics, environmental exposures, lifestyle choices, concomitant medications, and comorbidities influence/personalize medication dosing.

Workshop Objectives:

- Participants will be able to identify what is meant by precision or personalized medicine as it applies to patients being treated for chronic illnesses.
- Participants will be able to describe the types of 'omic' tests available for 200 + medications, who orders them, and what testing companies will complete them.
- Participants will be able to recognize the role of the pharmacist, physician, IT professional, genetic counselor, and laboratory testing facility in interpretation of 'omic' studies.

PM Workshop 4: "Positive Physical Approach™ (PPA) and Hand Under Hand™ (HUH)"

Speaker: *Teresa Youngstrom, RN, Owner, A Better Approach to Memory Care*

Workshop Description:

This workshop focuses on Positive Approach to Care "care partnering" techniques, including Positive Physical Approach™ (PPA) and Hand Under Hand™ (HUH). These newly learned skills enable care partners to shift from simply "dealing with the behaviors" to creating a positive and caring environment. Learners develop observational skills needed to recognize signals of "unmet needs and growing distress" in the person they care for and respond in a way that reduces anxiety and improves quality of life.

Workshop Objectives:

- Participants will be able to learn how to apply Positive Physical Approach™ (PPA) and Hand Under Hand™ (HUH) in everyday situations.
- Participants will be able to learn the importance of doing "with", not "to".
- Participants will be able to develop observational skills necessary to recognize and address unmet emotional and physical needs.
- Participants will be able to learn ways to help the person being cared for feel productive and valued.