Outline

INFORMED CONSENT
Michelle Graunke • 1.0 ethics

Legal definition

Exceptions

GUARDIANSHIP
When necessary, who can be, where to find a guardian, cost

Guardianship of the person/estate

Powers of a guardian

Administering the guardianship

Limited vs. full guardianship

Legal status of an incapacitated person

ADVANCE DIRECTIVES
Patient self-determination act

Power of Attorney/Health Care

Preventing & remedying financial abuses

Living will

Power of Attorney/Property

THE ABCS OF MEDICARE 2019
Judith Bendersky

Changes in “improvement standard”

Original vs Medicare advantage

Medicare prescription drug coverage in ABC and D

Question and answer session

MEDICAID LONG-TERM CARE COVERAGE: AN OVERVIEW & FOCUS ON NEWER RULES
Jacob Menashe

Status of Medicaid Reform Proposals

Impact of Affordable Care Act

Long-Term Care basics

Costs of Long-Term Care

Payers of Long-Term Care

Different Medicaid programs available

Income rules

Resource rules

Estate recovery

Gifting rules & related criminal & civil penalties

MORE ON MEDICAID LONG-TERM CARE COVERAGE
Jacob Menashe

Possible Medicaid planning for single people

Possible Medicaid planning for married couples

Considerations & risks involved with Medicaid planning

Planning to avoid Medicaid if possible & its importance

Special Needs Trusts & Medicaid

Resources & further reading

Questions?
Call Customer Service:
800-844-8260

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Live Seminar Schedule

8:00 Registration/Morning Coffee & Tea

8:30 Program begins

11:45-12:45 Lunch *(on your own)*

4:00 Program ends

There will be two 15-min breaks (mid-morning & mid-afternoon). Actual lunch and break start times are at the discretion of the speakers. A more detailed schedule is available upon request.

Objectives

1. Consider the legal options and instruments available to patients for providing informed consent under Washington law.
2. Explore the legal and ethical considerations of informed consent and guardianship as it relates to the treatment of clients/patients.
3. Identify benefits for clients under Medicare Parts A, B, C and D.
4. Articulate local resources for clients to get assistance navigating Medicare.
5. Summarize the new and longstanding rules patients face when trying to access Medicaid long-term care programs.
6. Articulate key Medicaid ACA provisions, how they differ from traditional Medicaid and how they impact access to care.
7. Recognize the considerations and risks involved with Medicaid planning and when planning for a patient may be ill-advised.

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LEGAL • FINANCIAL • MEDICAID TODAY

- Informed Consent
- Guardianship/Conservatorship
- Advance Directives
- ABCs & D of Medicare 2019
- Medicaid LTC Coverage
  - Status of Medicaid Reform Proposals
  - Planning Tools
  - Special Needs Trusts

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If you provide services to geriatric populations, your organization faces a legal and regulatory maze. In order to understand the needs and concerns of patients and their families, and to provide appropriate services and referrals, you are expected to have a thorough understanding of common and complex issues related to *informed consent, guardianship and advance directives, Medicare 2019, Medicaid eligibility, answers to commonly asked questions regarding Medicaid* - and more.

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Ms. Graunke, Ms. Bendersky, and Mr. Menashe will provide current information that is crucial to understanding the legal and financial issues which impact the everyday aspects of providing health care services. You will leave this seminar with more confidence in care planning and case management of your geriatric patients.

Speakers

Michelle Lynn Graunke, JD, has had her own practice in Seattle since 2004. Her practice focuses on guardianship law, elder law, probates, trusts, and estate planning. She graduated, *cum laude*, from Seattle University School of Law in 1998 and was an associate with the law firm of Thompson & Howle for five years before establishing her own practice. Ms. Graunke is a past chair of the Elder Law Section of the Washington State Bar Association and of the Guardianship and Elder Law Section of the King County Bar Association. She is a frequent speaker on elder law issues including incapacity, guardianship, alternatives to guardianship, probate, and estate planning.

Speaker Disclosure:
Financial: Michelle Lynn Graunke is the owner and attorney for The Law Office of Michelle Lynn Graunke. She receives a speaking honorarium from PESI, Inc.
Non-financial: Michelle Lynn Graunke has no relevant non-financial relationship to disclose.

Judith Bendersky, SHIBA Field Supervisor, works for the Washington State Office of the Insurance Commissioner's (OIC) Statewide Health Insurance Benefits Advisors (SHIBA) program. She supervises five regional training consultants who provide continuing education to 26 SHIBA sponsors around the state. The 26 sponsors utilize agency staff and community volunteer advisors to provide outreach and one-on-one counseling to Medicare beneficiaries, their families and caregivers.

Prior to joining the OIC in 2016, Judith enjoyed a variety of positions in public health in Alaska, including 10 years managing the Medicare Information Office and helping solve many confusing Medicare issues for clients. Prior to that, she staffed the Governor's Council on Disabilities and Special Education, worked in Rural Community health development with Head Start as a mental, dental and health coordinator.

Judith started her career in public health in Indonesia before moving to Alaska and working for the Indian Health Service as a health educator. She has a Master's in Public Health from Loma Linda University and earned her certification as a health education specialist and a gerontologist through the University of Washington.

Speaker Disclosure:
Financial: Judith Bendersky has an employment relationship with the Washington State Office of the Insurance Commissioner's (OIC) Statewide Health Insurance Benefits Advisors (SHIBA) program.
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Jacob H. Menashe, JD, and William S. Hickman formed the law firm of Hickman Menashe, P.S., in 2005. He is a graduate of Stanford University and University of California Hastings College of the Law. Mr. Menashe's areas of practice include wills, trusts, and estate planning; special needs trusts; long-term care and Medicaid planning; guardianships; and probate. Prior to opening Hickman Menashe, he practiced as an associate at the law firm of Isenhour Bleck, PLLC. Mr. Menashe is a past chair of the Elder Law Section of the Washington State Bar Association, and a member of the National Academy of Elder Law Attorneys, the Special Needs Alliance, and the Snohomish Estate Planning Council. He regularly speaks before Washington State and local bar groups, estate planning councils, and community groups. Mr. Menashe enjoys meeting people, learning their stories and helping them put important planning in place that will make a difference for themselves and their loved ones.

Speaker Disclosure:
Financial: Jacob Menashe is a partner with Hickman Menashe, P.S. He receives a speaking honorarium from PESI, Inc.
Non-financial: Jacob Menashe is a member of the Washington State Bar Association; National Academy of Elder Law Attorneys; and the Special Needs Alliance.

TARGET AUDIENCE:

Social Workers • Nursing Home Administrators • Nurses • Counselors • Admissions Directors • Case Managers
Discharge Planners • Health Care Facilities • Financial/Business Office Managers • Patient Care Coordinators • Psychologists

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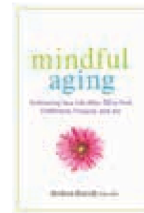
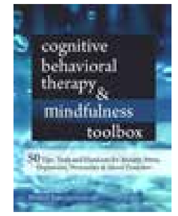


Mindful Aging

Embracing Your Life After 50 to Find Fulfillment, Purpose, and Joy

By Andrea Brandt, PhD, MFT

The acclaimed *Mindful Aging* is full of exercises and tools to help you embrace a new mindset and blaze a new trail in your life fueled by passion, purpose, and creativity. Through research, inspiring stories of real people, and Dr. Brandt's psychological insight, you'll be able to claim the immense joy and love that are yours to have, the deep wisdom that is yours to share, and the exciting self-discoveries and contributions that are uniquely yours to make.



Cognitive Behavioral Therapy & Mindfulness Toolbox

50 Tips, Tools and Handouts for Anxiety, Stress, Depression, Personality and Mood Disorders

By Richard Sears, PsyD, MBA, ABPP

Clinical psychologist and mindfulness expert Dr. Richard Sears has created a practical, engaging skills manual that clearly defines the principles of CBT and then demonstrates steps for integrating mindfulness practices into therapy -- all drawing from the latest research. Straight-forward explanations and dozens of worksheets provide fresh insights and new tools to move therapy forward when treating stress, anxiety, panic, depression, pain, trauma, addictions, and other issues.

Just One Thing Card Deck

52 Practices for More Happiness, Love and Wisdom

By Rick Hanson, Ph.D.

We are so busy these days that it's great to have just one thing to focus on: a simple practice to reflect on and be inspired by that will gradually strengthen your neural pathways of happiness, love, and wisdom. These practices are grounded in brain science, positive psychology, and contemplative training. They're simple and easy to do - and they produce powerful results: bringing you more joy, more fulfilling relationships, and more peace of mind and heart.

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If your profession is not listed, please contact your licensing board to determine your continuing education requirements and check for reciprocal approval. For other credit inquiries not specified below, or questions on home study credit availability, please contact cepesi@pesi.com or 800-844-8260 before the event.

Materials that are included in this course may include interventions and modalities that are beyond the authorized practice of mental health professionals. As a licensed professional, you are responsible for reviewing the scope of practice, including activities that are defined in law as beyond the boundaries of practice in accordance with and in compliance with your professions standards.

PESI, Inc. offers continuing education programs and products under the brand names PESI, PESI Healthcare, PESI Rehab and Psychotherapy Networker.

ETHICS: This seminar qualifies for 1.0 hours of state specific ethics instruction. If ethics is not specified within your licensing board's approval statement below, please contact your board to determine the applicability and amount of ethics allowed.

COUNSELORS: This intermediate activity consists of 6.0 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please save the course outline, the certificate of completion you receive from the activity and contact your state board or organization to determine specific filing requirements.

NURSE/NURSE PRACTITIONERS/CLINICAL NURSE SPECIALISTS: This intermediate activity consists of 6.0 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please contact your licensing board to determine if they accept programs or providers approved by other national or state licensing boards. A certificate of attendance will be awarded at the end of the program to participants who are in full attendance and who complete the program evaluation.

NURSING HOME ADMINISTRATORS: This program has been submitted (but not yet approved) for 6.0 continuing education clock hours and 6.0 participant hours from NAB/NCERS. Call our customer service department at 1-800-843-7763 for further information.

PSYCHOLOGISTS: PESI, Inc. is approved by the American Psychological Association to sponsor continuing education for psychologists. PESI maintains responsibility for this program and its content. PESI is offering this activity for 6.0 hours of continuing education credit. Full attendance is required; no partial credits will be offered for partial attendance.

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