PRESENTER BIOGRAPHICAL SKETCHES

Care Planning Hearing

HITPC Certification and Adoption Workgroup

September 23, 2013

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**Legal Perspective**

*Charles Sabatino, JD, American Bar Association Commission on Law and Aging*

**Charles P. Sabatino, JD**, is director of the ABA Commission on Law and Aging in Washington, D.C., where, since 1984, he has been responsible for the ABA Commission's research, project development, consultation, and education in areas of guardianship, health law, long-term care, capacity issues, surrogate decision-making, legal services delivery for the elderly, and professional ethics. Mr. Sabatino is also a part-time adjunct professor at Georgetown University Law Center where he has taught Law and Aging since 1987. He received his A.B. from Cornell University and his J.D. from Georgetown University Law Center and is a member of the Virginia and D.C. bars.

**Panel 1: State Perspective**

*Patricia Bomba, MD, FACP, Excellus BlueCross BlueShield*

*Christie North, MBA, FACHE, HealthInsights*

*Alvin Moss, MD, FACP, FAAHPM, WV Health Information Network*

*Brian Yeaman, MD, Oklahoma Health Information Exchange*

**Dr. Patricia Bomba, MD, FACP,** is a nationally-recognized expert who currently serves as the Vice President and Medical Director, Geriatrics for Excellus Health Plan, Inc. and subsidiaries of The Lifetime Healthcare Companies.  In her current role, she serves as a geriatric consultant on projects and program development affecting seniors. She is a nationally recognized palliative care and end-of-life expert who designs and oversees the implementation of community projects. Prior to her work at Excellus Health Plan, Inc., she was engaged in private practice in Internal Medicine and Geriatrics in Rochester, New York.

Dr. Bomba is New York State’s representative on the National POLST Paradigm Task Force, a multistate collaborative. In addition to serving as a New York State Delegate to the White House Conference on Aging, she served as a member of the Review Committee of the National Quality Forum’s “Framework and Preferred Practices for a Palliative and Hospice Care Quality” project, chairs the BlueCross and BlueShield Association National Medical Management Forum and is a member of the Medical Society of the State of New York Ethics Committee.

Dr. Bomba is passionately focused on educating the medical community, the public at large with a goal of improving the quality of life for seniors and their families. She has spoken extensively regionally, statewide and nationally to professionals, community groups and professional organizations on issues related to Palliative Care, Pain Management, Advance Care Planning, End-of-Life Care, Elder Abuse and Wellness and Healthy Living for the Older Adult. Dr. Bomba is author of several articles on issues related to palliative care, elder abuse and end-of-life concerns. She authors a bimonthly electronic newsletter dedicated to raising awareness of elder abuse and palliative care that can be found at the link [www.medamericaltc.com/elder-abuse-prevention](http://www.medamericaltc.com/elder-abuse-prevention).

Dr. Bomba earned a bachelors degree from Immaculata College and graduated from the University of Virginia School Of Medicine. She completed her residency in Internal Medicine at the University of Rochester. Dr. Bomba holds board certification in Internal Medicine, with Added Qualifications in Geriatric Medicine. She attended the Executive Development Program at the Wharton Business School.

**Christie North, MBA, FACHE,** is currently the executive lead for the Beacon Community Collaborative Agreement, a project sponsored and funded by the Office of the Coordinator for Health Information Technology. This $15m agreement includes partners from all areas of the healthcare system and stakeholders from all of the key stakeholder groups in the community.

One important aspect of the Beacon Program has been the development of an electronic POLST. Ms. North participates on the ePOLST Advisory Board and the Leaving Well Coalition, whose mission is to assure all persons have the opportunity to discuss advanced care planning and record their wishes to help each to have the end of life they would like.

**Dr. Alvin Moss, MD, FACP, FAAHPM,** is a Professor of Medicine at the West Virginia University School of Medicine, the Director of the West Virginia University Center for Health Ethics and Law, and the Executive Director of the West Virginia Center for End-of-Life Care which oversees the West Virginia Physician Orders for Scope of Treatment (POST) program and the West Virginia e-Directive Registry. He served as a co-investigator on a multisite National Institutes of Health-funded project to study the effectiveness of advance care planning through the use of the Physician Orders for Life-Sustaining Treatment (POLST) program. He is a graduate of Harvard University and the University of Pennsylvania School of Medicine. Dr. Moss is married, and he and his wife Marlene have six children.

**Dr. Brian Yeaman, MD**, is a primary care physician and is the Chief Medical Informatics Officer at Norman Regional Health System in Norman, Oklahoma. He has been named Norman Regional Health System Physician of the Year. Dr. Yeaman has over ten years of informatics experience in helping organizations transform the capture, integration and delivery of clinical data, information, and knowledge. Dr. Yeaman was instrumental in establishing the Health Information Exchange in Oklahoma, which currently serves over three million patients. Passionate about consumer engagement and care coordination, Dr. Yeaman is interested in caring for patients in a medical home model. He has leveraged meaningful use to track admissions, readmissions, and emergency department visits for long term care patients, which has reduced the cost of care and improved outcomes.

**Panel 2: Implementers – Hospitals and Providers**

*Carol Wilson, Riverside Health System*

*B. Lachlan Forrow, MD, Beth Israel Deaconess Medical Center*

*Jeff Beane, Geriatrician*

*Ferdinando L. Mirarchi, DO, University of Pittsburgh Medical Center*

*Bernard Hammes, MD, Gundersen Health System*

**Carol Wilson** is the Director of Palliative Care Services and Advance Care Planning at Riverside Health System, based in Newport News, Virginia. She holds a Masters in Health Administration and a Certificate in Healthcare Ethics. Over the last 12 years she has developed and managed inpatient palliative care consultation services, and she has advocated for effective advance care planning for most of her career. At Riverside, Carol has adapted work processes in all care settings to more effectively understand and honor informed patient choice. She has participated in training over 150 advance care planning facilitators.

Carol is experienced with developing coalitions to meet complex needs in the community. She is active with the Virginia POST Collaborative and the Virginia Palliative Care Forum. Most recently she has been instrumental in convening a coalition of the four health systems and four local Agencies on Aging in Eastern Virginia to promote Advance Care Planning.

**Dr. B. Lachlan Forrow**, MD, is a general internist and Director of Ethics and Palliative Care Programs at Boston’s Beth Israel Deaconess Medical Center, and Associate Professor of Medicine at Harvard Medical School.  Dr. Forrow has been a national leader in efforts to improve care near the end of life, including as a Faculty Scholar for the Project on Death in America.  He chaired the recent Massachusetts Expert Panel on End-of-Life Care, serving as lead author on its landmark report *Patient-Centered Care and Human Mortality: The Urgency of Health System Reforms to Ensure Respect for Patients’ Wishes and Accountability for Excellence in Care.* He currently serves as National Faculty Chair for an Institute for Healthcare Improvement consortium of health care organizations pioneering improvements in patient-centered end-of-life care.

**Dr. Ferdinando L. Mirarchi, DO,** is the medical director of UPMC Hamot’s Emergency Department and chairman of the UPMC Hamot Physician Network Governance Council. He is the principal investigator of the TRIAD Studies (The Realistic Interpretation of Advance Directives). The results of his TRIAD I and II studies were featured in the New York Times. His research has led to a spiral report drafted and released by the PA Patient Safety Authority which depicts confusion and concern surrounding living wills and DNR orders. Recently, the results of the his TRIAD III study were released by The Journal of Emergency Medicine and confirms there is a nationwide risk to patient safety related to confusion surrounding living wills and DNR orders. Dr. Mirarchi is the author of “Understanding Your Living Will; What You Need to Know before a Medical Emergency” published by Addicus Books.

Dr. Mirarchi is a fellow of the American College of Emergency Physicians as well as a fellow of the American Academy of Emergency Medicine. He serves as a consultant for Emedicine.com. He has been published nationally and internationally in the field of emergency medicine and featured in national publications, including the USA Today, The New York Times, The Associated Press, and ABC News.

**Jeff Beane,** I enjoy helping people navigate through difficult times. I gain an incredibly intimate view into patients’ lives and into human nature in general. It’s a profound education. My patients tend to be a varied group. I take care of nursing care patients with mobility issues, patients suffering from strokes or disabilities, Alzheimer’s, and patients in home-health based community care programs. I interface often with psychiatrists and social workers. Because I believe in a holistic approach, I take into account a patient’s medical, psychological, familial, emotional status, not just the presenting medical issue. I believe in treating the whole patient.

I am involved with research concerning palliative care team development and hospital-based palliative care consultation teams. I am especially interested in hospice and end-of-life care, and in patients with advanced illness. I am also active in promoting palliative education nationally. I remain current in my field through attendance at conferences such as the American Academy of Hospice and Palliative Medicine and the American geriatric Society.

**Dr. Bernard Hammes** is the director of Medical Humanities and Respecting

Choices® for Gundersen Health System headquartered in La Crosse, Wisconsin. In this position, he provides educational programs for house staff, medical students, nursing students and physician assistant students. He also provides in-services and workshops for the medical staff, nursing staff, social workers and the pastoral care department. Dr. Hammes chairs both the Institutional Review Board and Ethics Committee at Gundersen. He serves the role of ethics consultant on the Ethics Committee.

Dr. Hammes’ work has been primarily focused on improving care for patients with serious illness. He has developed institutional policies and practices, staff education and patient/community education with a special focus on advance care planning. This work has resulted in two nationally recognized programs on advance care planning: If I Only Knew... and Respecting Choices. He served as editor for the book, Having Your Own Say: Getting the Right Care When It Matters Most, which was released in 2012. He has authored or co-authored 42 articles and book chapters that are focused on clinical ethics, advance care planning and care of patients with serious illness. Dr. Hammes is a member of the executive committee of the National POLST Paradigm Task Force and serves as the current past-chair of the Task Force. He is on the board of directors for the Coalition to Transform Advanced Care (C-TAC) and serves as the vice president of the International Society of Advance Care Planning.

Dr. Hammes was awarded the PDIA Palliative Medicine Community Leadership Award by the American Academy of Hospice and Palliative Medicine in 2012.

This award recognizes an individual for contributions to the advancement of the field of palliative medicine through the education and training of future leaders. He is professor of Clinical Science at the University of Wisconsin-La Crosse, an associate adjunct professor of the Institute for Health and Society at the Medical College of Wisconsin and a clinical assistant professor in the Department of Pediatrics at the University of Wisconsin School of Medicine and Public Health.

Dr. Hammes was educated at the University of Notre Dame, receiving his bachelor of arts in 1972 and his doctorate in philosophy in 1978. He has taught at the University of Gonzaga in Spokane, Washington, and at the University of Wisconsin-La Crosse.

**Panel 3: Implementers**

*Paul Malley, Aging with Dignity*

*Jeff Zucker, MyDirectives*

*Doug Winesett, MD, Epic*

**Paul Malley,** is President of Aging with Dignity, a national non-profit organization based in Tallahassee, Florida. In addition to directing Aging with Dignity’s many activities, Malley has also guided the efforts of several aging advocacy groups to improve policy on advance care planning. He was appointed by Gov. Jeb Bush to the Florida delegation of the 2005 White House Conference on Aging, an event held once every ten years to shape public policy on issues related to aging.

Malley and the work of Aging with Dignity have been featured in literally hundreds of stories in the national news media, including USA Today, Wall Street Journal, New York Times, Newsweek, Time and Consumer Reports, as well as on the CBS, NBC and ABC-TV evening news programs and on CNN and MSNBC cable TV shows. Malley has made presentations to groups as diverse as the National Association of Hospice and Home Care, Johns Hopkins School of Medicine, the National Foundation for Women Legislators, U.S. Department of State and Department of Justice, the National Naval Medical Center at Bethesda, Florida Department of Education and Executive Office of the Governor, Delta Airlines, and 3M.

Malley holds a Master of Arts degree in Communications from Florida State University. He joined Aging with Dignity in 1998 and was named its President in 2002. He and his wife, Almira, live in Tallahassee, Florida and have four children.

**Jeff Zucker** is the Co-Founder and Chief Executive Officer of ADVault, Inc., the creator and operator of MyDirectives®.  Mr. Zucker has over 25 years of business experience with large corporates, start-ups and turn-arounds in leadership, finance and public policy roles and serves, or has served, on various advisory, nonprofit and community boards.  He earned his undergraduate degree from the University of Michigan and his MBA from UCLA’s Anderson School.

**Dr. Doug Winesett,** **MD**, is a clinical informatics physician at Epic Systems Corporation.  Dr. Winesett has more than 20 years experience in clinical practice and currently works with the medical leadership of organizations around the country who are using Epic.  Prior to joining Epic he was the Associate Medical Director, Ambulatory EMR at Greenville Hospital System University Medical Group (Greenville, SC).  He also served as an associate informatician at Geisinger Medical Center (Danville, PA) during their implementation of Epic's software.

**Panel 4: Patient Perspective**

*Amy Berman, BS, RN, The John A. Hartford Foundation*

*Mark Savage, National Partnership for Women & Families*

*Karen Wyatt, MD, Physician, Author*

**Amy J. Berman, BS, RN,** is a Senior Program Officer at the Hartford Foundation, and heads the Integrating and Improving Services program, focusing on developing innovative, cost-effective models of care for older adults.  She also directs a number of collaborations with the U.S. Administration on Aging/AARP that address the needs of family caregivers.  Prior to joining Hartford, Ms. Berman served as Nursing Education Initiatives Director at the Hartford Institute for Geriatric Nursing at New York University’s College of Nursing, and before that she worked in home health care administration.  She has also served on the New York State Department of Health’s Emergency Preparedness Task Force, and is a member of numerous organizations, among them the Aging Task Force for Healthy People 2020, the Gerontological Society of America, and the Honor Society of Nursing, Sigma Theta Tau.  Ms. Berman earned a B.S. in nursing from New York University, a B.S. in health care administration from the University of Massachusetts, Amherst, and a Geriatric Scholar Certificate from the Consortium of New York Geriatric Education Centers.

**Mark Savage** is the director of health information technology policy and programs at the National Partnership for Women & Families. Savage oversees the National Partnership’s work to advance electronic health information exchange and technology for the benefit of individual and population health, health care delivery, reducing health disparities, and improving quality and patient safety. Among other things, Savage currently serves on the Consumer Empowerment Workgroup of the federal HIT Policy Committee, eHealth Initiative’s Leadership Council, and the California Health eQuality Program's Advisory Committee at U.C. Davis Medical Center's Institute for Population Health Improvement.

Prior to joining the National Partnership, Savage was senior attorney at Consumers Union, the policy and advocacy arm of Consumer Reports. His work there included developing, leading, and implementing strategic responses to health issues, health information exchange and technology, insurance redlining, automobile insurance rating, among other issues, through multi-cultural coalition building, advocacy on governmental and non-profit boards and committees, legislative advocacy, public education, and projects. From 2009-2013, he developed and led Consumers Union’s statewide project in California to advocate patients’ needs and amplify the consumer voice for electronic health information exchange and its core role in health care reform. Savage launched his passion as a civil-rights litigator at Public Advocates, a leading civil rights law firm in California where he became president and managing attorney.

Savage has a long history of advocating for consumers and multi-cultural communities on diverse issues. For example, in 2006, the California Lawyer magazine named him an Attorney of the Year for his landmark work against insurance redlining, ending auto insurers’ practice of basing premiums primarily on drivers’ ZIP code and basing them instead primarily on driving safety record. In 1998, the Southern Christian Leadership Conference of Greater Los Angeles presented him The Drum Major Award for his contributions to peace and justice. In 2001, the Pacific Central District of the Unitarian Universalist Association presented the "Living Our UU Values" award to him for consistently passionate and outstanding social justice work.

Savage is a graduate of Stanford Law School and the University of California, Berkeley. And without the love and support of his amazing family, none of this would have been possible.

**Dr. Karen Wyatt, MD,** graduated from the University of New Mexico School of Medicine and completed Family Practice Residency and a Fellowship in Psychiatry at the University of Utah. She spent many years of her clinical career as a hospice medical director and has written extensively about end-of-life care, including the book *What Really Matters: 7 Lessons for Living from the Stories of the Dying*. She is passionate about helping people find meaning and purpose even during the most difficult times of life.

Dr. Wyatt serves on the faculty of the Integral Health and Medicine Center where she teaches the application of Integral Theory to medical care, particularly at the end of life. She also hosts a radio show entitled *What Really Matters: Lessons from the End-of-Life*, which features interviews and conversations about all aspects of life and death. She has won numerous awards for her volunteer service including the *Spirit of the American Woman Award* and being named one of *Utah’s 100 Notable Women*.