

PRESENTER BIOGRAPHICAL SKETCHES

ONC BH EHR Certification Virtual Hearing
January 28, 2014

Panel 1: Patient and Caregiver Perspective

Daniel Fisher, Ph.D, Mental Health America

Dr. Daniel Fisher obtained a PhD in biochemistry, to discover the so called chemical basis of mental health conditions. While carrying out neurochemical research at NIMH, Dan was diagnosed with schizophrenia. He recovered, and to humanize the mental health system became a psychiatrist and worked for 25 years as a community psychiatrist, founded the National Empowerment Center, was a member of the New Freedom Commission on Mental Health, helped organize the National Coalition for Mental Health Recovery, and is on the faculty of U. Mass Dept. of Psychiatry. He is one of the developers and trainers of emotionalCPR.

Panel 2: Behavioral Health Provider Perspective

Lori Simon, MD, American Psychiatric Association
Stacey Larson, JD, PsyD, American Psychiatric Association
Roger D. Smith, American Association for Marriage & Family
Therapy Michael Alonso, Seneca Family of Agencies

Dr. Lori Simon has had a dual career, both in computers and as a psychiatrist. After obtaining a BS in Computer Science, she worked in the computer field for the next 18 years, including 13 with IBM. During that time, she worked both as a computer programmer and systems analyst/project leader responsible for the development and implementation of a variety of different software applications and a health industry specialist/systems engineer providing technical support to IBM's healthcare accounts in New York City. She also taught systems analyst as an adjunct professor at New York University and spent 10 weeks studying advanced computer science topics within IBM's Systems Research Institute (SRI) with a focus on Artificial Intelligence.

Since completing her residency in Psychiatry at New York Presbyterian Hospital – Cornell/Payne Whitney Clinic, Dr. Simon has worked in a variety of clinical settings, including a psychiatry ER, inpatient units doing consultation/liaison, and various sites providing direct care to the homeless. During that time, she has maintained a solo private practice in both New York City and northern New Jersey providing both psychotherapy and psychopharmacology. She is currently a member of both the APA's EHR Committee and SAMHSA's National Advisory Council for Substance Abuse Treatment. She is also involved with SAMHSA's HIT efforts and the HL7 organization's efforts in behavioral health.

Dr. Stacey Larson is a Director with the Legal & Regulatory Affairs Department at the American Psychological Association in the Practice Directorate. She works on issues related to Electronic Health Records, HIPAA/HITECH, and parity as well as various other legal and ethical issues. She is co-chair of the Health Information Technology workgroup whose goal is to facilitate the education of APA members with respect to the utility and policy behind electronic health records as they are used in clinical practice.

Prior to APA, Stacey worked in forensic psychology for the State of Delaware. She received her undergraduate degree from the University of MN and her graduate degrees in law and psychology from Widener University School of Law and Institute for Graduate Clinical Psychology.

Roger D. Smith serves as chief legal counsel for the AAMFT and supervises the AAMFT's ethical code compliance and legal risk management programs. He provides assistance to AAMFT's state chapters concerning state advocacy initiatives. Roger also serves as AAMFT's representative to the Alliance of Military and Veteran Family Behavioral Health Providers and to the American Red Cross Disaster Mental Health Partners Group.

Roger received a bachelor's degree from Purdue University. He earned his law degree from the Indiana University School of Law in Indianapolis. Prior to joining AAMFT in 2005, Roger served as a Deputy Attorney General in the Office of the Indiana Attorney General.

Michael Alonso has served as the Director of Information Technology at Seneca Family of Agencies for the past 11 years. Seneca is a non-profit children's mental health agency providing a wide spectrum of services to children across the state of California. He has been involved in all aspects of technology within the organization, including a significant emphasis on Electronic Health Record (EHR) initiatives. He led the effort to develop a single EHR system that could address the wide variety of needs found across all Seneca programs. Coming from a strong background of business software development, he continues to apply this expertise toward the goal of enabling interconnection among various electronic systems used in California behavioral health.

Panel 3: Behavioral Health Provider Perspective cont.

Paul McLaughlin, American Association for the Treatment of Opioid Dependence

Richard Rosenthal, American Academy of Addiction Psychiatry

David Gastfriend, American Society of Addiction Medicine

Mohini Venkatesh, National Council for Behavioral Health

Paul McLaughlin began his career in the field of addiction treatment in 1971 when he accepted a position with the Stamford (CT) Health Department as Administrator for its Narcotic Addiction Treatment Program. In 1977 he accepted a position with the Department of Psychiatry at Yale University as Associate Director of its Drug

Dependence Unit. While most of his time at Yale was devoted to administrative and supervisory duties, it was there that he developed an appreciation for the role of research in the development of evidence-based clinical practices and treatment models. For the past thirty-three years he has served as the President/CEO of the Hartford Dispensary – a community-based organization that presently operates nine accredited outpatient opioid treatment programs that serve approximately 4,100 patients per day. Mr. McLaughlin is the Chairman of the Connecticut Methadone Treatment Directors, a Director of the American Association for the Treatment of Opioid Dependence and an active participant of NIDA's Clinical Trials Network as well as other state and national organizations. He received a Baccalaureate in Psychology from the University of Southern Connecticut (1966) and a Masters in Psychology from The New School for Social and Political Research in New York (1968).

Dr. Richard Rosenthal is Professor of Psychiatry at the Icahn School of Medicine at Mount Sinai, and Medical Director of Addiction Psychiatry in the Mount Sinai Institute of Mental Health. Dr. Rosenthal is a Distinguished Fellow of the American Psychiatric Association and a Fellow of the New York Academy of Medicine and a past president of both the American Academy of Addiction Psychiatry and the American Association for Technology in Psychiatry. Dr. Rosenthal has been appointed to the NY State Mental Health Services Council as well as receiving numerous awards and honors including the Founders Award of the American Academy of Addiction Psychiatry, more than ten years in New York Magazine's Best Doctors in New York and several years in The Best Doctors in America.

Dr. Rosenthal's main research and clinical focus for more than 25 years has been on the evaluation and treatment of co-occurring substance use and other mental disorders. He was a Senior Fellow, SAMHSA Co-Occurring Disorders Center for Excellence and Co-Chairman of its National Steering Council, and most recently Senior Advisor to the Center for Excellence in Integrated Care. He has authored more than 90 peer-reviewed journal articles, invited reviews, book chapters, and books and serves on the editorial board of *American Journal on Addictions*. Dr. Rosenthal also maintains a private practice of psychotherapy and psychopharmacology for mood and addictive disorders.

Dr. David Gastfriend is an addiction psychiatrist who completed his training at Massachusetts General Hospital (MGH). At Harvard Medical School and MGH over a 25-year span, he was Director of the MGH Addiction Research Program and founded Harvard's Addiction Psychiatry Fellowship. His pharmacologic and behavioral research activities included serving as an investigator in the National Institute on Drug Abuse (NIDA) Cocaine Collaborative Study, and as investigator and committee chair in the National Institute on Alcohol Abuse and Alcoholism (NIAAA) COMBINE Study and the NIDA Clinical Trials Network. As the lead researcher on the American Society of Addiction Medicine's (ASAM's) Patient Placement Criteria, his efforts to operationalize and validate these contributed to their endorsement by most U.S. states, the Veterans Administration and the Department of Defense. NIDA granted him a Mid-Career Investigator Award for Patient-Oriented Research in 2000. From 2004 - 2013, he was Vice President at Alkermes, Inc., and directed scientific publications and presentations

on clinical and health economic research in addiction. In 2007, he received the “Champion in Health Care – Innovator Award” from the Boston Business Journal for his research on Vivitrol®. Among his 150 scientific publications are the books *The ASAM Criteria* and *Addiction Treatment Matching*. Dr. Gastfriend is the Chief Architect of the ASAM Criteria Software, which SAMHSA has developed for nationwide release. He has advised the governments of China, Iceland, Israel, Norway, Russia and the U.S. on advances in alcohol and drug addiction treatment. He is the 2012 recipient of ASAM’s McGovern Award and Lecture for contributions to addiction treatment and society. In 2014 he was named the inaugural Institute Scholar at the Treatment Research Institute in Philadelphia PA, where he collaborates with senior scientists to synergize efforts across diverse studies in addiction research and implement their findings into practice and public policy.

Mohini Venkatesh is the Vice President of Practice Improvement at the National Council for Behavioral Health. In this position, Ms. Venkatesh leads a variety of practice improvement and leadership programs that help mental health and addiction provider organizations develop business and clinical strategies to most efficiently serve their communities. She serves as the staff policy liaison to the National Council’s network of associations throughout the states, and conducts federal legislative analysis on health reform and other policy issues. Prior to being in Washington, D.C., she worked on an inpatient psychiatric unit in a general hospital in Massachusetts and has worked at several social service non-profit organizations, including a state association advocating for community behavioral health services. Ms. Venkatesh is the board vice-chair for a community behavioral health organization in Washington, D.C. and is a fellow with the Non-Profit Roundtable’s Future Executive Directors Program. She received a Masters in Public Health from Yale University and a B.A. in Psychology from the University of Massachusetts-Amherst.

Panel 4: Vendor Perspective

Melinda Wagner, RN, BSN, MS, MBA, Cerner

Kevin Scalia, NetSmart Technologies, Inc.

Paul LeBeau, SMART Management, Inc.

Katherine Peres, Ph.D. Synergistic Office Solutions, Inc.

Joe Viger, Software and Technology Vendors’ Association

Melinda Wagner is the General Manager for Behavioral Health, representing Cerner Corporation. She has over 20 years of executive healthcare experience. She joined Cerner in 2012 to be a part of their mission to improve the health of communities and is especially passionate about creating solutions that support care for the whole person, mind and body. Prior to Cerner, Melinda was the Chief Operating Officer of a multi-specialty physician group.

Kevin Scalia is Executive Vice President of Corporate Development for Netsmart, leading provider of clinical solutions to more than 20,000 health and human services organizations nationwide.

Scalia has executive management responsibility for strategic planning, mergers and acquisitions, business development, marketing, and product management. He also manages strategic relationships, and is responsible for developing alliances with key industry associations. Scalia joined Netsmart in December 2002, and prior to moving to his current position he served as Netsmart's vice president of operations.

Scalia has been dedicated over the past several years in developing Netsmart's Care Coordination and HIE product line and its use as part of the Netsmart Health Home product line. This led to Netsmart being selected as the technology platform for the NYC behavioral health health home. He has been an evangelist nationally for the need to integrate behavioral health into the physical health ecosystem to address the 25 year early death rate of consumers with serious mental illness.

Scalia played a significant leadership role in legislative and policy initiatives to include behavioral health providers as eligible for Medicaid and Medicare incentive funds for the Meaningful Use of Electronic Health Records. He continues proactive efforts with industry association to advance corrective legislation in Congress that would expand eligibility to additional provider groups.

Before joining Netsmart, Scalia served as president and chief operating officer of a Long Island, N.Y.- based professional services firm that provided enterprise applications to mid-size and Fortune 500 companies, and as chairman and chief executive officer for a manufacturer of supercomputers, security equipment and medical imaging equipment. Scalia was also an advisor to the first President George Bush, representing small business on issues related to defense transformation.

Scalia is a founding member of the Long Island Software and Technology Network and a member of the College of Engineering Advisory Board, State University of New York at Stony Brook. Scalia graduated from Rochester Institute of Technology with a B.S. in Electrical Engineering and has a Masters Degree in Systems Engineering from Polytechnic University.

Paul LeBeau is *Vice President Product & Technology*, SMART Management, Inc., and has been a software developer for more than 35 years, originally producing business and accounting systems. Paul helped establish SMART in 1992 and since that time has led the team that created the substance abuse treatment industry's pioneering clinical operations package, The Smart System.

Dr. Katherine Peres is Vice President and co-owner of Synergistic Office Solutions, Inc. (SOS Software), a small, mission-driven software company providing services and products to behavioral health providers since 1985. While SOS' primary product is practice management software for private practice behavioral health providers and small behavioral health and chemical dependency agencies, SOS has also provided a comprehensive clinical record software product since 1989.

Dr. Peres earned her Ph.D. in Personality and Clinical Psychology from University of Florida in 1978. For fifteen years, she co-owned and operated a private psychology practice in South Florida. She is a past President of Florida Psychological Association. Dr. Peres has been a member of the American Psychological Association since 1980. She served on and chaired APA's Public Information Committee in the early 1990's. From 1992-1994 she was a member of the Committee for the Advancement of Professional Practice (CAPP), the body charged with representing and advancing psychologists' roles in professional practice.

Since 1993, Dr. Peres has worked fulltime at her responsibilities at SOS Software where she oversees operations, sales and marketing, and customer service. SOS Software has been a member of the Software and Technology Vendors Association (SATVA) since 2004.

In 2006 and 2007, as a representative of SATVA, Dr. Peres worked on the Behavioral Health Functional Profile as a member of the Behavioral Health Profile Working Group, co-chaired by Jim Kretz (SAMSHA), Sarah Minden, M.D. (Abt Associates), and Tom Trabin, Ph.D. (SATVA). This profile was an early attempt to reconcile the functional requirements of a Behavioral Health EHR with those of an EHR for general healthcare.

Joe Viger is Vice President of Business Development at The Echo Group and is the current President of the Board of Directors of the Software and Technology Vendor Association (SATVA). SATVA is a trade association for leading vendors of behavioral health software.

Panel 5: Health Information Exchange Perspective

Wende Baker, MEd., Electronic Behavioral Health Information Network (eBHIN)

Laura McCrary, Ed.D., Kansas Health Information Network (RHIN)

Charlie Hewitt, MBA, Rhode Island Quality Institutes (RIQI)

Wende Baker has a BS in Dietetics from the University of California Chico. She moved to Nebraska as a VISTA volunteer and served 17 years as Executive Director for the Food Bank of Lincoln. During that time, she served on the Board of Directors of the Second Harvest National Food Bank Network, where she was involved with the selection and adoption of a nationwide inventory management application. She was appointed by then Nebraska Governor Mike Johanns to the Electronic Benefits Transfer Legislative Task Force that was responsible for the development of system requirements, RFP issuance and vendor selection for the implementation of the Electronic Benefit Transfer (EBT) for public assistance programs in Nebraska. After gaining a MEd in Health Education from the University of Nebraska, she took a position with a community health planning organization where the development of a shared behavioral health technology system was conceived. She supported the organizational development of the Electronic Behavioral Health Information Network (eBHIN) until named Executive Director for the corporation in October 2008. Baker provides

leadership to implement Health Information Exchange services integrated with Behavioral Health EMR applications among behavioral health providers in Nebraska.

Dr. Laura McCrary is the Executive Director of the Kansas Health Information Network (KHIN) based in Topeka, KS. KHIN is a Kansas non-profit organization that provides health information exchange technology services to over 650 health care organizations throughout Kansas. KHIN is a provider led and governed health information exchange and founding members include the Kansas Medical Society, the Kansas Hospital Association, and the Wichita Health Information Exchange (WHIE). Laura completed Post-Doctoral work at Kansas University; a Doctorate of Education from Kansas State University and MS degrees in the areas of Mental Illness and Learning Disabilities from Kansas State University. Laura is an adjunct professor at the Rockhurst University Helzberg School of Management and she is a member of the National Policy Steering Committee for eHealth Initiative and an Advisory Board Member for Johnson County Community College's HITECH program.

Charlie Hewitt is the Director, Health Information Exchange Products Delivery, at the Rhode Island Quality Institute. He leads the implementation and operation of CurrentCare, Rhode Island's statewide health information exchange. Mr. Hewitt has a long record of leadership and innovation and has held position in a diverse group of industries including health care, local government, aerospace & defense, discrete manufacturing, financial services, and computer services. He holds an MBA from Harvard Business School and a BA cum laude in General Studies from Harvard College.

Panel 6: Regulatory/Quality Improvement Perspective

David Lloyd, MTM Services

Justin Harding, J.D., National Association of State Mental Health Program Directors

Rick Harwood, National Association of State Alcohol & Drug Abuse Directors

Tim Knettlar, National Research Institute

David Lloyd is founder of M.T.M. (Management, Training and Measurement) Services based in the Raleigh, North Carolina. Mr. Lloyd is the author of *How to Maximize Service Capacity* and *How to Deliver Accountable Care* and co-author of *Operationalizing Healthcare Reform* that have been used by CBHOs as a resource guide to support change management needs as funding and external accountability requirements have changed during the past two decades. In his books, Mr. Lloyd has developed service process models, principles and solutions on how CBHOs can deliver "Best Value" accountable care.

David Lloyd has been a featured presenter at numerous national, regional, state and local workshops and conferences. His strength lies in his energetic, motivational and focused "We Can Do This" consultation style. Mr. Lloyd's management expertise is built

on a foundation of over forty-five years' experience in both private-for-profit and Community Behavioral Healthcare Organization (CBHO) settings.

Mr. Lloyd has successfully adapted his management, training and measurement private-for-profit experience to support CBHO service delivery accountable care change management needs through providing consultation/training to over 700 CBHOs in 48 states in the US and outside the US in Canada and The Netherlands.

Mr. Lloyd has extensive experience in developing standardized data elements to support behavioral health clinical forms that support Medical Necessity documentation linkage requirements for Medicaid and Medicare including Diagnostic Assessments, Diagnostic Assessment Updates, Initial Psychiatric Evaluations, Individual Service Plans, Service Plan Review/Revisions, Psychiatric Progress Notes, Nursing Progress Notes, Individual Therapy Progress Notes, Group Progress Notes, Community Support Staff Progress Notes, Partial Hospital Progress Notes, Residential Progress Notes and Discharge/Transfer Summary.

Mr. Lloyd's experience indicates that the most challenging part of change management implementation at CBHOs is not necessarily the design/ development of solutions in the initial planning phases of the re-engineering process. The key challenge has been focused on moving the CBHO from a "loosely held federation of private practices/programs" operational model to a "managed group practice model" of service delivery that supports a reduction in individual staff and system practice variance. These variances create implementation barriers to implementing changes needed for CBHOs to participate in new integrated healthcare services that are an important part of healthcare reform.

Justin Harding, with an impressive and diverse set of background experiences, ranging from corporate law for Fortune 500 companies to working with school kids with emotional disabilities, Mr. Harding is able to skillfully problem-solve and seamlessly perform any task set before him. Mr. Harding manages NASMHPD activities such as technical assistance on a wide array of subjects, including state systems improvement, peer support, services for consumers, and whole health integration. Mr. Harding has been with NASMHPD for a decade, and assists with monitoring and informing NASMHPD members about all federal regulatory and enforcement actions, and monitoring Affordable Care Act and parity implementation.

Rick Hardwood is the Director of Research and Program Applications of the National Association of State Alcohol and Drug Abuse Directors, Inc., (NASADAD) a 501c3 entity that works on behalf of the respective States, the District of Columbia and the Territories to promote improved delivery of public substance abuse services. He has over 30 years' experience researching the economic costs of health disorders and analyzing of the effectiveness and financing of health care, with a primary focus on substance abuse services. Previously, he worked at The Lewin Group, was a Senior Policy Analyst in the Office of National Drug Control Policy (ONDCP), Executive Office of the President, was

on the professional staff of the Institute of Medicine, and at the Research Triangle Institute.

Tim Knettler has over 20 year's executive level experience in both for-profit and not-for-profit organizations. He has provided strategic planning, global strategies, transition (Interim) management, revenue/membership growth, public policy/advocacy and other leadership expertise to associations and other non-profit and government organizations. Mr. Knettler currently serves on the Key Professional Association Committee (KPAC) - made up of invited CEO's of the American Society of Association Executives (ASAE), and previously served on Joint Commission's Expert Panel that developed new privileging standards. He is the main contact for new initiatives and works closely with our federal partners, colleagues, and multiple associations to inform the public mental health system through our research and analytical capacities.