

THE AMERICAN ASSOCIATION OF NURSE ATTORNEYS (TAANA) AND  
THE AMERICAN ASSOCIATION OF NURSE ATTORNEYS FOUNDATION (TAANAF) PRESENTS:

# 2016 ANNUAL MEETING & EDUCATIONAL CONFERENCE



# TAANA

THE AMERICAN ASSOCIATION OF NURSE ATTORNEYS

## NOVEMBER 10-12, 2016

## FAIRMONT HOTEL | DALLAS, TEXAS

"Thanks for your kind & caring support. It is too bad I have to get hit in the head again if I want to continue our business relationship." L.B. ♦ "As the case proceeded, we came to feel that our case was not being 'handled by lawyers' but, rather, that we were being taken care of by good friends who happened to be very excellent lawyers." E.H. ♦ "These people are my friends for life." R.A. ♦ "I consider Marc to be one of the most caring and trustworthy individuals I have ever met and am truly grateful for his service." K.M.L. ♦ "The compassion and professionalism this firm surrounded us with helped to put our lives back in perspective with such dignity and grace." K.L. ♦ "The thing that I liked the most of what he told me came with his firm's representation, was that he and his associates would see my family and I through this ordeal, that they cared what happened to us. I am happy to say I can verify that he was a man of his word." K.M. ♦ "My life is back on track. I cannot imagine what my life would be like now without their help." C.Y. ♦ "They are people of great integrity and loyalty, as well as

being personal friends." H.G.M. ♦ "I have to say it must have been a gift from God that helped me find Lenahan Law. His ability to calmly and accurately communicate put my mind at ease the first time we talked. He's an honest and ethical man that I only thought existed in the movies." L.J. ♦ "I will forever be grateful for their excellent treatment of me." M.E. ♦ "This strange life I've lead has caused me to work with many great attorneys, including Melvin Belli. But I'll tell you this, Marc is the best attorney I've ever met. He will be my family's attorney for life." W.C. ♦ "As a metroplex Deputy Fire Chief and Paramedic, I am used to helping others in their time of need and when I was in need Marc stepped in and did a great job." C.T. ♦ "[T]he single most important factor that impressed us about Marc is that he honestly cares about his clients." H.S. ♦ "Since I had never been involved with a lawsuit before, I had so many questions and every one of my calls or emails were answered promptly and handled with patience and honesty. Marc and his associates treated us like family." K.W. ♦

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| Super Lawyers Honoree,<br>2009 - Present (a Thomson<br>Reuters Service) | Super Lawyers Honoree,<br>2009 - Present (a Thomson<br>Reuters Service)                 | Rising Stars Honoree,<br>2012 - Present (a Thomson<br>Reuters Service)              | National Crime Victim Bar<br>Assoc., Amicus Committee                                   |

# SAVE THE DATE

## 2017 Annual Meeting & Educational Conference

### August 3-5, 2017

Boston Marriott Copley Place



# T A A N A

THE AMERICAN ASSOCIATION OF NURSE ATTORNEYS



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Dear Friends and Colleagues:

Welcome to TAANA's 35th Annual Meeting and Educational Conference. This year's program addresses a variety of contemporary issues, including challenges in clinical and legal ethics, public health law, and access to justice, as well as developments in the regulation of nursing practice. No less important than the educational content will be the opportunities to make and renew valuable connections with other nurse attorneys. I hope you will join one of our Thursday dinner groups and that you'll come with us to Billy Bob's – the world's largest honkey tonk – on Friday night.



On behalf of TAANA and the TAANA Foundation, thank you for joining us at the world's foremost gathering of nurse attorneys. We look forward to learning and networking with you.

Sincerely,

*Jonathan D. Stewart, JD, MS, RN  
31st President, The American Association of Nurse Attorneys*



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# ABOUT TAANA

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## 2016 TAANA BOARD OF DIRECTORS

Jonathan D. Stewart, RN, MS, JD, CPHRM, *President*  
Melanie Balestra, BSN, MN, NP, JD, *President-Elect*  
Carolyn Dolan, JD, MSN, FNP-BC, PNP-BC, *Treasurer*  
Paula F. Henry, RN, NP, JD, *Recording Secretary*  
Felicia Stokes, JD, RN, *Corresponding Secretary*  
Teresa M. Sanzio, RN, MPA, JD, *Immediate Past President*  
Alice Dupler, JD, APRN-BC  
Katherine Kaby Anselmi, JD, PhD, CRNP-BC  
Ronnie McKinnon, RN, JD, CPHRM, CPSO, CPPS  
Marc Meyer, RN, JD, MS  
Karen J. Halpern, RN, BSN, MSN, JD  
Kathleen M. Kearney, JD, MSN, BSN, RN

## TAANA Executive Office

Robert Ranieri  
*Account Manager*  
3416 Primm Lane  
Birmingham, Alabama  
35216 USA  
P: 205-824-7615,  
877-538-2262  
F: 205-823-2760  
<http://www.taana.org>

## 2016 ANNUAL MEETING & EDUCATIONAL CONFERENCE COMMITTEE MEMBERS

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Melanie Balestra, Chair  
Kathleen Kearney, Co-Chair  
Patricia Blair  
Carolyn Dolan  
Alice Dupler  
Melinda Jones

Taralynn Mackay  
Rosemary McCarthy  
Marc Meyer  
Teresa M. Sanzio  
Jonathan Stewart

## TAANA PAST PRESIDENTS

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1983-84 - Cynthia E. Northrop\*  
1985 - Diane Trace Warlick  
1986 - Mary Kelly  
1987 - Katherine J. Pohlman  
1988 - Katherine J. Pohlman  
1989 - Katherine J. Pohlman  
1990 - Mary Powers Antoine  
1991 - Mary Todd Cotton  
1992 - Karen Shedd Guarino  
1993 - Tonia D. Aiken  
1994 - Linda M. E. Auton  
1995 - Julie M. Bargnesi  
1996 - Diane M. Rodriguez  
1997 - M. Jeanne Trott  
1998 - Davia Solomon  
1999 - Sally N. Austin  
2000 - Andrea Gansheimer

2001 - Diane Kjervik  
2002 - Virginia Fleming\*  
2003 - Penny G. Westfall  
2004 - Joanne P. Sheehan  
2005 - Susan E. Ziel  
2006 - Cynthia A. Mikos  
2007 - Janet Feldkamp  
2008 - Rosemary McCarthy  
2009 - Rosemary McCarthy  
2010 - Kathleen McCormac  
2011 - Edie Brous  
2012 - Nancy Hoffman  
2013 - Kathleen Murphy Jones  
2014 - Paula F. Henry  
2015 - Teresa Sanzio

\*deceased

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# TAANA VISION

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Advocating excellence and creating opportunities for nurse attorneys.

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## TAANA MISSION STATEMENT

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The American Association of Nurse Attorneys (TAANA) provides resources, education and leadership to its members and the healthcare and legal communities.

- To promote and enhance TAANA and the profession of the nurse attorney
- To provide educational programs, products and services to members, chapters and the public
- To facilitate communication, collaboration and leadership among members
- To serve as a resource for the healthcare and legal communities

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## AWARDS

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**Please join us on Friday, November 12 in the Pavilion Room for the TAANA Awards Ceremony and Luncheon sponsored by NSO. Lunch will begin at 12 noon and awards will be announced shortly thereafter.**

The **OUTSTANDING ADVOCATE AWARD** recognizes an individual member's outstanding legal advocacy. The Awards Committee recognizes that a nurse attorney can be an advocate in varied ways including: impacting legislation, authoring works, achieving significant legal rulings, etc. The award is intended to give recognition to a member whose legal theories, strategies, and abilities demonstrate outstanding advocacy.

The **OUTSTANDING CHAPTER AWARD** recognizes one TAANA chapter each year that has demonstrated excellence in providing resources, education, and leadership to its members and the health care and legal communities.

The **OUTSTANDING SECTION MEMBER AWARD** recognizes one TAANA section (Education, Litigation, Health Law & Compliance) member each year that has demonstrated excellence in providing resources, education, and leadership to the section members, the healthcare and legal communities, and to TAANA.

*Awards continued on page 8*

The **CYNTHIA NORTHROP DISTINGUISHED SERVICE AWARD** recognizes an individual member's leadership role in, and significant contribution to TAANA as an association. The award serves as an expression of gratitude for the member's committed leadership, participation in, and contributions to the purposes of TAANA and its growth as the professional association for nurse attorneys. The Cynthia Northrop Distinguished Service Award is named for the founder and first president of TAANA.

### **TAANA 2016 Awards Committee**

Chair: Rosemary McCarthy, MS, JD  
Carolyn Dolan, JD, MSN, FNP-BC, PNP-BC  
Randi Kopf, RN, MS, JD  
Teresa M. Sanzio, RN, MPA, JD

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## TAANA FOUNDATION

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**TAANA Foundation** is a charitable affiliated organization of TAANA and was separately incorporated in 1984 as a non-profit organization which operates exclusively for charitable, scientific, literary or educational purposes and provides financial support in the furtherance of charitable purposes.

**Silent Auction:** Since 1991, the TAANA Foundation has held a Silent Auction at the TAANA Annual Educational Conference as a fundraiser in support of the Foundation's purposes.

**Community Grant:** Since 2004 TAANA Foundation has chosen a community service agency in the locality of the annual conference as recipient of a grant in recognition of services provided to vulnerable populations in that area.

**TAANA Foundation's 2016 Community Grant Award:** The 2016 TAANA Foundation Community Grant Awardee is WINGS Dallas, Nurse-Family Partnership. This nonprofit community organization's "purpose is to provide women and their families a path to a better life." The Grant Award will be given directly to the Nurse-Family Partnership program. This program assists first-time, at-risk mothers by preparing them with baby, child and parenting skills and helps them plan for their future.

**Mary Eleanor McGarvah Award:** The Foundation established a humanitarian award in honor of Mary Eleanor McGarvah, the first nurse attorney. The award is granted to an individual or group that has made a significant contribution to



the development of health law, nursing and policy. Naming the award in honor of Mary Eleanor McGarvah is in recognition of her contribution to the public's health and to society in her role as attorney and public health nurse. There is no recipient this year.

**Cynthia Ellen Northrop New Advocate Award:** The Foundation established this award to give student and new graduate TAANA members an opportunity to attend the TAANA Annual Educational Conference. There is no recipient this year.

#### **TAANA 2016 Foundation Board of Trustees**

Randi Kopf, RN, MS, JD, President

JoAnne Pietro, RN, JD, Secretary

Elizabeth Beall, RN, JD, Treasurer

Rosemary McCarthy, MS, JD, Trustee

Janet Michael, BSN, MSN, JD, Trustee

Kathleen Kearney, JD, MSN, BSN, RN, Cross Over Trustee

Teressa M. Sanzio, RN, MPA, JD, Cross Over Trustee

Trudy A. Kiaunis, BSN, JD, Emeritus Trustee



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# AGENDA

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## **TAANA Annual Business Meeting**

Friday, November 11, 7:45am – 8:30am

Fairmont Hotel, Dallas, Texas

Pavilion Room

- I. Call to Order
- II. President's Welcome | Jonathan Stewart
- III. Adoption of Standard Meeting Rules and Agenda
- IV. Approval of Prior Meeting Minutes
- V. New Business
  - a. Resolution 1 Concerning Publication of the Journal of Law & Nursing | Jonathan Stewart
  - b. Resolution 2 Concerning the Frequency of TAANA's Educational Conferences | Kathleen Kearney
- V. Reports
  - a. Treasurer's Report | Carolyn Dolan
  - b. Chapter President's Council | TBD
  - c. TAANA Foundation | Randi Kopf
  - d. Nominations and Elections Committee | Melanie Balestra
- VII. Adjourn

# 2016 SPONSORS AND EXHIBITORS

TAANA acknowledges and gratefully expresses our appreciation to the following organizations and individuals for supporting the TAANA Annual Meeting.

Please visit the exhibits in *Pavilion Room* and thank the exhibitors for their continued support and commitment to TAANA.



*Awards Luncheon Sponsor & Exhibitor*

NSO is the #1 provider of professional liability insurance for nursing professionals, with over 1 million clients, including individuals and businesses. NSO has been serving the healthcare community's risk management needs for over 30 years.



**TAANA-Texas Chapter**

*Thursday Afternoon Break Sponsor*

TAANA-TEXAS was established in 1992. We represent the Texas State Chapter of The American Association of Nurse Attorneys. We have been involved with various issues affecting nurses through the years. Our positions as both nurses and attorneys often provide an opportunity to effect improvements in nursing law in order to improve nursing practice. For example, TAANA-TEXAS advocated for changes to the Texas Peer Review rules to protect the rights of nurses during the peer review process. Chapter members monitor proposed rules, regulations, and statute changes with an eye for potential harm to nurses or nursing practice.



# TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER™

## School of Nursing

### **Texas Tech University Health Sciences Center School of Nursing**

#### *Bronze Sponsor*

Texas Tech University Health Sciences Center is dedicated to education, patient care and research and has made an impact on the health of West Texas and beyond for almost 40 years. To date, we have trained more than 10,000 health care professionals, and we meet the health care needs of more than 2.5 million people who live throughout a vast 108-county area stretching from the Texas Panhandle south to the Permian Basin and west into Eastern New Mexico. We have established ourselves as a leader in education and patient care and are building a top-ranked research environment with significant studies under way in areas such as aging, cancer, reproduction, genetic diseases and rural health. In addition, our location adjacent to Texas Tech University provides a unique opportunity for advancement of knowledge through scientific collaborations. Our goal is to become known as an institution that advances knowledge for students and practicing health care professionals through educational opportunities and research while providing quality patient care and service.



## **ASSUREDANALYSIS** CREATING CLARITY

### **Assured Analysis, LLC**

#### *Exhibitor*

Assured Analysis creates clarity. We leverage our medical experience with our legal expertise to decipher medical records that are voluminous and often poorly organized to create an accurate picture of the facts. Concealed in each record set is a story hidden in a mountain of unrelated data. Like a puzzle, each page provides a clue until the complete picture is slowly revealed. We meticulously examine each detail, acutely aware and sensitive to the human element the pages contain. Our team is made up of medical and legal professionals who have a heart for helping people. Our mission is to create clarity that helps bring protection to the innocent and accountability when appropriate. Assured Analysis creates clarity.



**Millennium Settlements Consulting**

Exhibitor

Millennium Settlement Consulting® is unique in the industry, designed to meet the varying needs of each client through an innovative settlement planning approach that brings results. Our structured settlement consultants offer the most comprehensive advisory services and innovative financial programs in the industry. Through our extensive case preparation and litigation support services, we customize the design of each settlement plan to work specifically in the best interest of our clients and their families, ensuring protection of their financial futures. With Millennium, our clients can plan more, control more, and expect more...for life!



# NURSING AND LEGAL EDUCATION CONTACT HOURS

## Nursing Credits

Provider (TAANA) approved by the California Board of Registered Nursing. Provider #CEP16785, for 15.25 Contact Hours. The licensee must retain this document for a period of four (4) years after the course concludes. See *TAANA NURSING AND CONTINUING EDUCATION HOURS FORM* in the program.

## Continuing Legal Education Credits

Please submit your attendance certificate to your local state bar for consideration of legal education credits. The conference is pending approval from the State Bar of Texas for 15.25 CLE's including 3.25 CLE's for ethics. See *TAANA NURSING AND CONTINUING EDUCATION HOURS FORM* in the program.

## Registration Desk Hours

The registration desk will be open in the Pavilion Room during the following hours.

**Thursday, November 10**  
12 noon to 5:00 pm

**Friday, November 11**  
7:30 am to 5:00 pm  
(closed 12noon to 1:30pm for lunch)

**Saturday, November 12**  
8:00 am to 12 noon

# TAANA SCHEDULE OF EVENTS

## THURSDAY, NOVEMBER 10

| Time               | Location   | Event   |
|--------------------|------------|---|
| 8:00 am – 12:00 pm | Florentine | TAANA Board of Directors Meeting  |
| 12:00 pm – 2:00 pm | Pavilion   | Exhibit & Poster Set up   |
| 12:45 pm – 1:00 pm | Parisian   | Welcome & Opening   |
| 1pm – 2pm          | Parisian   | <i>Sociometry: Building Connections</i>   |
| 2pm – 3 pm         | Parisian   | <i>Pill Mill Epidemic &amp; Litigation</i>  |
| 3pm – 3:30 pm      | Pavilion   | Break in Exhibit Area   |
| 3:30 pm – 4:30 pm  | Parisian   | <i>Trusts and Developing a Careplan</i>   |
| 4:30 pm – 5:30 pm  | Parisian   | <i>Legal Ethics in Representing Healthcare Clients</i>  |
| 5:30 pm – 7:00 pm  | Pavilion   | Welcome Reception, Community Grant Award & Presentation of Poster Sessions:<br><i>The ANA Code of Ethics for Nurses: Implications for Professional Practice</i><br><i>The Role and Significance of the Sexual Assault Nurse Examiner in Sex Abuse Cases</i> |
| 7:00 pm            |            | Meet in Hotel Lobby for Dinner Groups   |

## FRIDAY, NOVEMBER 11

| Time                | Location | Event   |
|---------------------|----------|---|
| 7:45 am – 8:30 am   | Pavilion | Annual Business Meeting & Continental Breakfast   |
| 8:30 am – 9:30 am   | Parisian | <i>What do you Mean, I Might Lose my License?</i>   |
| 9:30 am – 10:30 am  | Parisian | <i>Brain Dead and Pregnant: Legal and Ethical Implications of the Marlise Muñoz Case</i>  |
| 10:30 am – 10:45 am | Pavilion | Break in Exhibit Area   |
| 10:45 am – 12:00 pm | Parisian | <i>Panel: The Effects of Tort Reform on Healthcare and Civil Justice</i>                  |
| 12:00 pm – 1:00 pm  | Pavilion | Awards Luncheon<br>Sponsored by NSO   |
| 1:00 pm – 2:00 pm   | Parisian | <i>Emergency Management of Infectious Disease</i>   |
| 2:00 pm – 3:00 pm   | Parisian | <i>Elder/ Dependent Adult Abuse in Healthcare Institutions and Mandated Reporting Law</i> |
| 3:00 pm – 3:30 pm   | Pavilion | Break in Exhibit Area   |
| 3:30 pm – 4:30 pm   | Parisian | <i>Panel: Statute of Limitations &amp; Double Jeopardy</i>                                |
| 4:30 pm – 5:30 pm   | Parisian | <i>Disclosure of Confidential Information</i>   |
| 5:30 pm – 6:30 pm   |          | Past Presidents Reception (by invitation only)  |
| 6:45 pm             |          | Meet in Hotel Lobby for Bus to Ft. Worth or Dinner Group                                  |

## SATURDAY, NOVEMBER 12

| Time                | Location | Event  |
|---------------------|----------|--|
| 8:00 am - 8:30 am   | Pavilion | Chapter Presidents and Sections Breakfast<br>(All Attendees Welcome)                             |
| 8:30 am – 9:30 am   | Parisian | <i>It's Here: The Final 60-Day Overpayment Rule<br/>(What it Means for you and your Clients)</i> |
| 9:30 am – 10:30 am  | Parisian | <i>Providing Care to Wards of Probate Courts</i>   |
| 10:30 am – 11:00 am | Pavilion | Break in Exhibit Area  |
| 11:00 am – 12:00 pm | Parisian | <i>Collateral Consequences of Criminal Convictions for<br/>Healthcare Practitioners</i>          |
| 12:00 pm – 1:00 pm  | Parisian | <i>Monitoring Agreements</i>   |

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# SCHEDULE OF PRESENTATIONS

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THURSDAY, NOVEMBER 10, 2016

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8:00am - 12:00noon

**TAANA Board of Directors Meeting**

*Florentine Room*

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12noon - 2:00pm

**Exhibit & Poster Set up**

*Pavilion Room*

---

12:45pm - 1:00pm

**Welcome & Opening**

*Parisian Room*

---

1:00pm - 2:00pm

**Sociometry: Building Connections**

CEU: 1.00; CLE: 1.00

*Parisian Room*

**Learner Objectives:**

1. Identify principles of sociometry.
2. Practice techniques for quickly building connections and relationships within a group.
3. Explore how sociometric techniques may be applied when interacting with juries, judges, clients, patients, or healthcare professionals

*Sean M. O'Connell; MA, JD, LL.M.; La Porte, Texas*

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2:00pm - 3:00pm

**Pill Mill Epidemic & Litigation**

CEU: 1.00; CLE: 1.00

**Parisian Room**

**Learner Objectives:**

1. Examine the causes and scope of the nationwide prescription drug epidemic.
2. Identify applicable legal and regulatory requirements for prescribers of opioids.
3. Discuss civil litigation of "pill mill" claims.

*Kay VanWey; JD; Van Wey Law, Dallas, TX*

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3:00pm - 3:30pm  
**Break in Exhibit Area**  
*Pavilion Room*

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3:30pm - 4:30pm  
**Trusts and Developing a Careplan**  
CEU: 1.00; CLE: 1.00  
*Parisian Room*

**Learner Objectives:**

1. Explore the challenges patients, trust administrators and care coordinators face in maintaining quality healthcare.
2. Examine how Trusts help patients maximize resources in order to maintain long-term financial stability.

*Chris Klemme; JD; Happy Trust Company, Addison, TX*

*Mindy Jones; MS, MBA, TxCG, CSA; Pyxis Care Management, Fort Worth, TX*

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4:30pm - 5:30pm  
**Legal Ethics in Representing Healthcare Clients**  
CEU: 1.00; CLE: 1.00 (1.00 ethics)  
*Parisian Room*

**Learner Objectives:**

1. Identify at least two applicable attorney ethical rules/responsibilities in advising client providers in healthcare settings.
2. Identify at least two applicable bioethical principles and two corporate ethical principles in healthcare matters.
3. Provide practice tips for attorneys to identify legal, risk and ethical issues in healthcare and to advise clients accordingly.

*Kathleen Hessler; RN, JD; Simone Healthcare Consultants, Albuquerque, NM*

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POSTER SESSIONS  
*Pavilion Room*

5:30pm - 7:00pm  
**The ANA Code of Ethics for Nurses: Implications for Professional Practice**

**Learner Objectives:**

1. Discuss abuse, access to health care, conflict of interest, end-of-life care, assignments, delegation, advocacy, error, policy development, pain and



suffering, altered standards of care; extraordinary settings, boundaries, collaboration, students, fatigue, dating, bullying and violence, moral distress, genetics, conscientious objection, Informed consent, culture: yours, mine and ours, social media and health disparities.

2. Analysis of the interpretative statements for the practical application in nursing, including the nurse's role with patients.
3. These statements discuss the nurse's role with patients, colleagues, local and global communities.
4. Discuss a nurse's obligation to think and act beyond the boundaries of the practice setting.
5. Analyze the revised code of ethics standards for nurses to create an ethical work environment and a culture of safety as well as taking actions for health policy changes, locally and globally.

*Liz Stokes; JD, RN; American Nurses Association, Washington, DC*

### **The Role and Significance of the Sexual Assault Nurse Examiner in Sex Abuse Cases**

#### **Learner Objectives:**

1. Discuss the history of sexual assault nurse examiners (SANEs).
2. Discuss minimum standards for sexual assault services.
3. Identify the role of the SANE in caring for sexual assault victims.
4. Describe components of the medical-forensic sexual assault exam.
5. Identify strategies for working with SANEs before and during trial.

*Carrie Edwards; PhD, RN, CA/CP SANE; Texas Tech University Health Sciences Center, Dallas, TX*

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5:30pm - 7:00pm

#### **Welcome Reception and Community Grant Award**

*Pavilion Room*

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7:00pm

#### **Dinner Groups Meet in Hotel Lobby**

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FRIDAY, NOVEMBER 11, 2016

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7:45am - 8:30am

**TAANA Annual Membership Meeting and Breakfast**

*Pavilion Room*

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8:30am - 9:30am

**What do you Mean, I Might Lose my License?**

CEU: 1.00; CLE: 1.00

*Parisian Room*

**Learner Objectives:**

1. Identify the most common allegations made to regulatory boards against healthcare practitioners.
2. Discuss contributing factors to final outcomes.
3. Identify risk control recommendations based on case review.

*Loretta D'Antonio; MBA; Vice President, Nurses Service Organization (NSO), Hatboro, PA*

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9:30am - 10:30am

**Brain Dead and Pregnant: Legal and Ethical Implications of the  
Marlise Muñoz Case**

CEU: 1.00; CLE: 1.00 (1.00 ethics)

*Parisian Room*

**Learner Objectives:**

1. Examine legal and ethical issues related to pregnancy, brain death and life-sustaining measures utilized against a family's wishes.
2. Analyze Munoz v. JPS and its effect on similarly-situated patients across the country.

*Jessica Hall Janicek; BBA, JD; KoonsFuller, PC, Southlake, TX*

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10:30am - 10:45am

**Break in Exhibit Area**

*Pavilion Room*

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10:45am - 12:00pm

**Panel: The Effects of Tort Reform on Healthcare and Civil Justice**

CEU: 1.25; CLE: 1.25 (1.25 ethics)

*Parisian Room*

**Learner Objectives:**

1. Identify the legal and ethical implications of tort reform.

2. Evaluate the effect of tort reform on patients, providers, healthcare and the civil justice system.

*Imrana Manzanaras; RN, JD; Abraham, Watkins, Nichols, Sorrels, Agosto & Friend, Houston, TX*

*Judge Martin Hoffman; JD; District Court Judge; Dallas County, Dallas, TX*

*Colleen Carboy; RN, JD; Carboy Law Firm, Lewisville, TX*

*Jennifer A. King; JD; Burford & Ryburn, LLP, Dallas, TX*

*Moderator: Kathleen M. Kearney, JD, MSN, BSN, RN*

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12:00pm - 1:00pm

**Awards Luncheon**

*Pavilion Room*

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1:00pm - 2:00pm

**Emergency Management of Infectious Disease**

CEU: 1.00; CLE: 1.00

*Parisian Room*

**Learner Objectives:**

1. Understand legal issues in relation to high consequence infectious diseases.
2. Understand the role of local officials in Texas for public health and other emergencies.

*Judge Clay Lewis Jenkins; JD; Dallas County, TX*

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2:00pm - 3:00pm

**Elder/Dependent Adult Abuse in Healthcare Institutions and  
Mandated Reporting Law**

CEU: 1.00; CLE: 1.00

*Parisian Room*

**Learner Objectives:**

1. Discuss the key components of Abuse of the Elder/Dependent Adult and Mandated Reporting Law.
2. Identify the complexity of the Mandated Reporting Law.
3. Understand healthcare providers' decision making process for abuse of elder/dependent adult investigation and Regulatory and Mandated Reporter compliance.

*Cecille Hestor; JD; Hester Law Group, APC, Glendale, CA*

*Sandra Higelin; MSN, RN, CNS, CWCN, CLNC; Sandra Higelin Nurse Consulting Services, Palm Springs, CA*

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3:00pm - 3:30pm  
**Break in Exhibit Area**  
*Pavilion Room*

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3:30pm - 4:30pm  
**Panel: Statute of Limitations & Double Jeopardy**  
CEU: 1.00; CLE: 1.00  
*Parisian Room*

**Learner Objective:**

1. Explore how the issues of inadequate or lack of a statute of limitations, retained jurisdiction and the ability of state boards to take reciprocal action can negatively impact nurses who face board discipline and what can be done about it.

*Teressa M. Sanzio; RN, MPA, JD; Law Office of Teressa M. Sanzio, P.C., Phoenix, AZ*  
*Kathleen M. Gialanella; RN, BSN, JD, LL.M.; Kathleen M. Gialanella, Esq., PC, Westfield, NJ*

*Tracy L. Singh; RN, JD; The Law Offices of Tracy L. Singh, LLC, Las Vegas, NV*  
*Melanie L. Balestra; JD, NP, MN; Law Offices of Melanie L. Balestra, Irvine, CA*

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4:30pm - 5:30pm  
**Disclosure of Confidential Information**  
CEU: 1.00; CLE: 1.00  
*Parisian Room*

**Learner Objectives:**

1. Understand the scope and circumstances regarding purportedly confidential information.
2. Discuss circumstances by which the allegedly confidential information can or must be disclosed.
3. Discuss the potential consequences of disclosing confidential information.
4. Identify the differences between various types of confidential information, when disclosure is allowed, and the consequences for improper disclosures.

*Keith L. Hovey; RN, JD; Szaferman Lakind, Lawrenceville, NJ*

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5:30pm - 6:30pm  
**Past Presidents Reception**  
*Location TBD*

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6:45pm  
**Meet in Hotel Lobby for Dinner Groups or Bus to Fort Worth (Billy Bob's)**  
*Hotel Lobby*

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SATURDAY, NOVEMBER 12, 2016

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8:00am - 8:30am

**Sections and Chapter Presidents Council Breakfast**

*Pavilion Room*

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8:30am - 9:30am

**It's Here: The Final 60-Day Overpayment Rule  
(What it Means for you and your Clients)**

CEU: 1.00; CLE: 1.00

*Parisian Room*

**Learner Objectives:**

1. Describe the overpayment report and requirements set forth in the Final Rule, including what it means to identify an overpayment and CMS's expectations for provider compliance programs.
2. Understand the limitations of the Final Rule and questions the Final Rule leaves unanswered.
3. Understand how providers can structure their compliance programs to ensure compliance with the 60-day rule.
4. Understand the steps providers can take to resolve overpayments upon identification.

*Hillary Stemple; JD; Arent Fox LLP, Washington, DC*

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9:30am - 10:30am

**Providing Care to Wards of Probate Courts**

CEU: 1.00; CLE: 1.00

*Parisian Room*

**Learner Objectives:**

1. Development of an Electronic Statewide Distance Training Program (Court Visitor or CVP Program), designed to improve the knowledge, skills, competencies and outcomes of the undergraduate nursing workforce and impact Wards of the Texas Probate Courts.
2. Implementation of the Electronic Statewide Court Visitor Program, designed to assure the appropriate supply, diversity, composition and distribution of the undergraduate nursing workforce.
3. Evaluation of the Electronic Statewide Court Visitor Program, to ensure the infrastructure to support the availability and sustainability of a full range of healthcare skills and services to Wards, eliminate health disparities and assure quality of care.

*Mary O'Keefe; RN, PhD, JD, FAAN; UTMB School of Nursing, Galveston, TX*



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10:30am - 11:00am  
**Break in Exhibit Area**  
*Pavilion Room*

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11:00am - 12:00pm  
**Collateral Consequences of Criminal Convictions for Healthcare Practitioners**  
CEU: 1.00; CLE: 1.00  
*Parisian Room*

**Learner Objectives:**

1. Identify the sections of the criminal code which subject a nurse to an automatic revocation.
2. Identify steps a criminal defense attorney can take to minimize the consequences of the criminal conviction on a professional license.
3. Discuss arguments and authorities which provide certain defenses to disciplinary actions when the nurse is convicted.
4. Identify the actions likely to be taken by the Department of Health and Human Services OIG with regard to potential exclusions of providers.

*Marc Meyer; RN, MS, JD; Law Office of Marc Meyer, PLLC, Magnolia, TX*

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12:00pm - 1:00pm  
**Monitoring Agreements**  
CEU: 1.00; CLE: 1.00  
*Parisian Room*

**Learner Objective:**

1. Educate, advise and counsel licensees, attorneys and employers on the significant legal and practical consequences of the various monitoring contracts, documents, and specific clauses related to employer and licensing board based investigations regarding impairment allegations.

*Richard Hark; JD; Hark and Hark, Philadelphia, PA*

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# CONFERENCE FACULTY

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***Melanie L. Balestra; JD, NP, MN; Law Offices of Melanie L. Balestra, Irvine, CA***

Melanie has her own law firm in Irvine, California. She practices healthcare law in California and Arizona. She focuses on legal and business issues that affect physicians, physician assistants, nurses, nurse practitioners, and other health care providers as well as representing them before their respective Boards. She has written many articles on liability and disciplinary issues confronting nurse practitioners and lectures nationally on these issues. She is counsel for the California Association of Nurse Practitioners and Vice-President of the American Association of Nurse Attorneys. She continues to practice as a Pediatric Nurse Practitioner at Laguna Beach Community Clinic. She received her law degree from Gonzaga University School of Law, her MN from UCLA and her BSN from Duke University.

***Colleen Carboy; RN, JD; Carboy Law Firm, Lewisville, TX***

Colleen Carboy is board certified by the Texas Board of Legal Specialization in Personal Injury Trial Law, and is also a Registered Nurse who specializes in complex litigation involving health care. With Ms. Carboy's experience and other qualifications, she has the unique ability to master the medical issues in cases while effectively exposing health care providers' negligent actions. Ms. Carboy has successfully handled numerous complex cases involving physician errors, hospital negligence, pharmaceutical mistakes and nursing home neglect. In addition to achieving successful settlements and verdicts for her clients, she vigorously strives to improve health care in Texas by negotiating settlements that include changes in hospital policies and mandatory continuing education for defendant health care providers. Ms. Carboy is also a frequent invited lecturer for attorney and health care organizations. Ms. Carboy has achieved a Martindale-Hubbell AV® Preeminent Rating. Ms. Carboy is a life member of the Multi-Million Dollar Advocates Forum, which recognizes lawyers who have achieved superior results in complex litigation. Ms. Carboy has also been recognized as a "Nation's Top One Percent" by the National Association of Distinguished Counsel. She has also been selected by her peers as a "Super Lawyer" in Personal Injury Plaintiff, Medical Malpractice from 2009 to 2016. Ms. Carboy is a fellowship member of The College of the State Bar of Texas. Ms. Carboy's cases have been featured on Dateline, and she has appeared on Good Morning America, CNN, The O'Reilly Factor and WFAA, the Dallas ABC Affiliate. Ms. Carboy is the Program Co-Director for the Annual Medical Malpractice Conference of the Texas Trial Lawyers Association. Ms. Carboy is the Vice President of the Dallas Trial Lawyers Association, and she is on the Board of Directors of the Texas Trial Lawyers Association and the Texas Association of Nurse Attorneys. Ms. Carboy is a member of the American Association of Nurse Attorneys, the American Nurses Association, and the Texas Nurses Association.

***Loretta D'Antonio; RN; Nurses Service Organization (NSO), Hatboro, PA***

Loretta D'Antonio is a Vice President in Aon Affinity's Healthcare Division with more than 20 years of professional liability experience. Loretta has primary accountability for technology initiatives supporting more than 1 million nurse and allied health practitioners. She previously managed customer retention initiatives as well as our private practice program. Loretta is a licensed P&C and LAH agent. She earned an MBA from St. Joseph's University in Philadelphia, PA with her undergraduate from Rosemont College. She has served as an adjunct faculty member for two local universities in their business administration and health services administration programs.

***Carrie Edwards; PhD, RN, CA/CP SANE; Texas Tech University Health Sciences Center, Dallas, TX***

Dr. Edwards received her PhD in Nursing from Texas Women's University in Denton, Texas. She is currently an Assistant Professor of Nursing at Texas Tech University Health Sciences Center (Dallas campus) and the Director of Forensic Nurse Staffing of West Texas. Dr. Edwards was certified as an adult and pediatric sexual assault nurse examiner in 2005 by the Office of the Attorney General for the State of Texas. Over the past 10 years, she has treated greater than 300 victims of sexual abuse. As a practicing forensic nurse, Dr. Edwards works as a sexual assault nurse examiner and as a legal nurse consultant. She is a content expert in the field of forensic nursing and has lectured both nationally and internationally on issues of violence against women and children. Dr. Edwards has formally been recognized by the United States Department of Justice Office for Victims of Crime, the Hi-Plains Chapter of the Emergency Nurses Association, the Young Professionals of Greater Lubbock, and as a Distinguished Alumni from the Texas Tech University Health Sciences Center School of Nursing. She is also currently a member of the Leadership Texas Class of 2016.

***Kathleen M. Gialanella; RN, BSN, JD, LLM; Kathleen M. Gialanella, Esq., PC, Westfield, NJ***

Ms. Gialanella is a practicing attorney in New Jersey and New York and a registered nurse. Her law practice specializes in the legal rights and obligations of licensed health care professionals. She has taught doctoral and masters courses in health law, ethics and policy at Teachers College, Columbia University and Seton Hall University School of Law and College of Nursing. Ms. Gialanella earned a BSN from the University of Maryland while serving in the US Army. She has a JD from New York Law School and an LLM in health law and policy from Seton Hall University. Ms. Gialanella has served as the president of both the New York and New Jersey Metropolitan Chapters of the American Association of Nurse Attorneys.

***Jessica Hall Janicek; BBA, JD; KoonsFuller, PC, Southlake, TX***

***Richard Hark; JD; Hark and Hark, Philadelphia, PA***

Richard represents individuals in a wide variety of state and federal criminal and professional license disciplinary prosecutions. Richard counsels clients in connection with health care related grand jury investigations and prosecutions by the U.S. Department of Justice and the Pennsylvania and New Jersey offices of the Attorney General. For the professional, Richard counsels Pennsylvania and New Jersey licensed doctors, pharmacists, and nurses facing disciplinary action before Pennsylvania's and New Jersey's Nursing, Medical and Pharmacy Boards. Richard's clients live both in and outside Pennsylvania and face disciplinary actions against their Pennsylvania or New Jersey professional license. Richard's professional licenses defense matters range from breach of scope of practice to criminal interactions and allegations of drug or alcohol impairment. Richard's twenty three years of federal and state criminal defense experience, ten of which include representing professionals in their disciplinary license matters, as a trial attorney, makes Richard the unique litigator handling these disciplinary and impairment cases.

***Kathleen Hessler; RN, JD; Simone Healthcare Consultants, Albuquerque, NM***

As Director of Compliance & Risk for Simone Healthcare Consultants, Ms. Hessler provides compliance, ethics and risk management advice to home health and hospice companies, including but not limited to compliance risk assessments and record and claims audits. Prior to joining Simone, she practiced healthcare law for seventeen years providing legal advice to long term and post-acute care companies. In addition to her degrees in law and nursing, she holds two Certificates in Health Care Ethics and has sat on numerous ethics committees for hospitals and long term care companies. Ms. Hessler is a frequent speaker at state and national healthcare and legal conferences. From 2010-2012, Ms. Hessler served as Director of Risk Management for CHRISTUS St. Vincent Regional Medical Center in Santa Fe, NM and was a member of the hospital ethics committee.

***Cecille Hester; JD; Hester Law Group, APC, Glendale, CA***

Cecille is a managing principal attorney of Hester Law Group, APC, a small boutique firm in Glendale, California. Prior to initiating her second career as an attorney 20 years ago, she was a paralegal/legal secretary and multi-tasked by attending law school at night and working full time to obtain her law degree. Ms. Hester's legal career has included the defense of professional/medical liability and general commercial liability cases, including trial. The primary focus of her practice over the last 15 years has been in the defense of cases brought against health care providers, including hospitals, skilled nursing facilities, residential care facilities, and physicians, under California's Elder and Dependent Adult Civil Protective Act (commonly known as the Elder Abuse Act) and companion causes of action, including medical malpractice/professional negligence, fraud, intentional conduct, and privacy violations. Ms. Hester also advises her health care clients on consent issues, mandatory reporting

under The Act, and health care regulatory issues. She has a strong record of successful defense results in her representation of health care clients.

***Sandra Higelin; MSN, RN, CNS, CWCN, CLNC; Sandra Higelin Nurse Consulting Services, Palm Springs, CA***

Sandra Higelin, MSN, RN, CWCN, CLNC, is the owner of Sandra Higelin Nurse Consulting Services. As a Geriatric Clinical Nurse Specialist, a Certified Wound Care Nurse, and a Certified Legal Nurse Consultant, she offers geriatric care consultations, wound care consultations, patient advocacy services, and educational programs in wound care and geriatric issues. She has vast experience in wound care prevention and management which includes policy procedure development and regulatory compliance. She is an experienced educator and speaker, having done workshops and presentations on multiple wound care topics. As a Certified Legal Nurse Consultant, Sandra provides expert witness services to both plaintiff and defense attorneys across the nation. Sandra is an active member of the Wound Ostomy Continence Nursing Association, The National Association of Certified Legal Nurse Consultants, the Gerontological Nurses Association, The American Society for Health Care Risk Management and the Southern California Association for Health Care Risk Management.

***Martin Hoffman; JD; Dallas County, Dallas, TX***

Judge Hoffman was elected in November of 2006 to the 68th District Court, which specializes in civil jurisdiction. Judge Hoffman has been honored with the Outstanding Trial Judge Award in 2013 by the Texas Attorney Mediator Coalition for his work with foreclosure mediation legislation. He has been elected three times by the 10,000 members of the Dallas Bar to the Dallas Bar Board of Directors. In 2012, Judge Hoffman was honored with the Outstanding Mentor award by both the Texas Young Lawyer Association and the Dallas Association of Young Lawyers. He was also selected by his peers at the George Allen Courthouse to serve at the Presiding Judge of the Central Jury Room for 2009 and as the Presiding Judge of the Civil District Judges for 2014. Judge Hoffman has been extensively involved with speaking and/or organizing continuing legal education events for the Dallas Bar Association, the Texas Bar Association, the Dallas Association of Young Lawyers, Dallas Women Lawyers Association and many other organizations. He has won awards from the American Bar Association, Texas Bar Association and Texas Young Lawyers for his work with different bar activities. Prior to taking the bench, Judge Hoffman was a practicing civil litigator for thirteen years. He initially worked for the law offices of Windle Turley and later became the litigation manager for the law firm of Smoger & Associates. He is board certified in Personal Injury Trial Law. Judge Hoffman received his undergraduate degree in economics from Trinity University and then graduated from University of Texas Law School.

***Keith L. Hovey; RN, JD; Szaferman Lakind, Lawrenceville, NJ***

***Clay Lewis Jenkins; JD; Dallas, TX***

Since taking office in 2011, Dallas County Judge Clay Jenkins has quickly become a strong voice for the County. Through his leadership, Dallas County continues to guide national conversation toward moral and compassionate responses. His advocacy on the Commissioners Court has helped balance several budget deficits without increasing taxes while simultaneously ensuring County business was both productive and less acrimonious. Judge Jenkins has been an outspoken advocate for expanded health coverage in Dallas County and throughout the State of Texas. Working with hospitals, physicians, business groups, and faith leaders to improve health care and reduce the burden on taxpayers and others who bear the cost for uncompensated care. He has worked closely with federal and local partners on the Health Insurance Marketplace and the Dallas County Affordable Care Act Coalition has been recognized by the White House as one of the best in the nation. As the chief-elected official of the county, Judge Jenkins is also the Director of Homeland Security and Emergency Management, as displayed in 2014 during Dallas County's response to the Ebola virus. Dallas County balanced public health with personal dignity, establishing the national standard. In 2011, he passed the most comprehensive local transparency and ethics reform in the state and continues to strengthen Dallas County's procurement process through building relationships with business partners and the community. Judge Jenkins is a public official whose business acumen and unparalleled compassion have revitalized the office of Dallas County Judge.

***Mindy Jones; MS, MBA, TxCG, CSA; Pyxis Care Management, Fort Worth, TX***

Ms. Jones founded Pyxis Care Management, a healthcare advocacy firm. She brings over 18 years of management and corporate experience with extensive senior management background in business analysis, sales, and marketing. With Masters' Degrees from Purdue University and the University of Texas at Dallas, her emphasis has been on strategic planning, market research, and business plan proposals. Mindy is a Texas Certified Guardian, a Certified Senior Advisor, and was named a "Healthcare Hero" by the Fort Worth Business Press. Community service plays an important role in her life. Not only is she a mother, she is also a lifetime member of Girl Scouts of America and a member of National Alliance on Mental Illness. She and her husband are active in their church and in scouting as well as in their children's schools.

***Kathleen M. Kearney; JD, MSN, BSN, RN; Lenahan Law Firm, Dallas, TX***

Kathleen is a Senior Attorney at Lenahan Law Firm in Dallas, Texas, and an Assistant Professor at Texas Tech University Health Science Center School of Nursing. She serves as lead faculty for Legal & Ethical Issues in Healthcare for the RN to BSN Program. Kathleen graduated from Boston College in 2000, and began her career as a Registered Nurse on a pediatric trauma and neurosurgical floor before attending Suffolk University Law School. She represents individuals all over Texas, and was named TAANA's Litigation Section Member of the Year

in 2009. Kathleen earned her MSN from Emory University and maintains board certification as a primary care Pediatric Nurse Practitioner. Since 2012, Kathleen has been annually recognized as a Rising Star (Texas, Super Lawyers, a Thomson Reuters service) and Top 40 Under 40 (The National Trial Lawyers) but is most proud of being named Dallas County's 2014 Big Sister of the Year for her role as a community mentor in Big Brothers Big Sisters from 2006 to 2014.

***Jennifer A. King; JD; Burford & Ryburn, LLP, Dallas, TX***

Jennifer A. King represents and counsels clients on business and professional disputes in the area of Medical Malpractice and Health Law. She works with clients to avoid litigation and to seek ways to minimize litigation and resolve the dispute in a cost-effective and timely manner. Jennifer has successfully defended hospital systems and physicians against a variety of claims, including medical/surgical department cases, obstetric cases, surgery cases, emergency department cases, pediatric cases, transplant cases, and ICU cases. She has been named a Super Lawyer, Rising Star, and to D Magazine's Best Lawyers in Dallas List on multiple occasions.

***Chris Klemme; JD; Happy Trust Company, Addison, TX***

Chris has been a licensed, practicing attorney since 1991. During his 20 years in private practice, Chris spent the first 13 years in a litigation practice, and spent the next 7 years running his own estate planning, probate and probate litigation practice. In 2011, Chris entered the bank side of trust practice with Regions Bank, where he served as a Vice President and Sr. Trust Officer. Chris joined Happy State Bank in June 2014 to expand the bank's trust practice into the Dallas-Fort Worth Metroplex. He received his B.A. in Political Science from Austin College in Sherman, Texas, and received his J.D. from Baylor University School of Law in Waco. Chris recently completed a two year term on the Executive Council of the Dallas Bar Association's Probate, Trust and Estate Planning section.

***Imrana Manzanares; RN, JD; Abraham, Watkins, Nichols, Sorrels, Agosto & Friend, Houston, TX***

Imrana Manzanares has been with Abraham Watkins since December 2009 and serves as the firm's Nurse Attorney. As both a nurse and a lawyer, Mrs. Manzanares not only litigates personal injury claims, but also reviews all of the firm's potential medical malpractice cases. To that end, she has reviewed in excess of 1,500 cases. As the firm's Nurse Attorney, Mrs. Manzanares is well-versed in the elements that make a medical malpractice allegation viable in light of tort reform instituted in 2003. Once a case is accepted, Mrs. Manzanares is involved in both the pre-litigation and litigation process, seeing a case all the way through trial or settlement. Mrs. Manzanares earned her Bachelors of Nursing from the University of Texas Medical Branch (UTMB) in 2002. Passionate about caring for those most ill, she worked in the Texas Medical Center's Intensive Care Units. In 2004, Mrs. Manzanares began

attending law school at the Thurgood Marshall School of Law. She found she could combine her nursing training with her legal training to assist patients and those most injured as a result of the negligence of another.

***Marc Meyer; RN, JD, MS; Law Office of Marc Meyer, PLLC, Magnolia, TX***

Marc began his career in health-care in 1983 in Ithaca, NY, volunteering for Cornell University EMS and the Lansing (NY) Fire Department while attending Cornell University. Marc received a BS in Biology from Cornell in 1986. In 1989, Marc graduated with a MS in biochemistry from Texas A&M University. While at Texas A&M, Marc volunteered with Texas A&M University EMS and obtained his paramedic training with Scott & White Hospital in 1990. In July, 1990, Marc joined the City of Houston Fire Department as a paramedic and firefighter. In 1998, Marc graduated with an AS in Nursing from Regents College (now Excelsior College) is licensed as a Registered Nurse by the Texas Board of Nursing. Marc has been employed as a nurse with the St. Luke's Episcopal Hospital and the Methodist Hospital System in the Emergency Department, Neurological ICU and Medical-Surgical floor settings. In 2009, Marc graduated from the South Texas College of Law and is licensed as an attorney by the State Bar of Texas. Marc is involved in the American Bar Association, Health Law Section and Young Lawyer Division; The American Association of Nurse Attorneys; the Woodlands Bar Association; and the Houston Bar Association. Marc holds leadership positions in the American Bar Association as the Vice-chair of Nursing and Allied Healthcare Issues Task Force and as the Vice-chair of the Web & Technology Committee of the Health Law Section; Marc was also President of the Texas chapter of the American Association of Nurse Attorneys.

***Sean M. O'Connell; MA, JD, LLM; La Porte, TX***

Sean started using the principles of JL Moreno in 2008 as a public defender in Dallas County to help better serve his clients. While working full time as a lawyer, he earned a Masters in Counseling and started training at the Bridging Harts Institute to learn how JL Moreno's methods apply to counseling and law. He currently helps lawyers prepare themselves and clients for cases as well as helping individuals, communities, businesses, organizations and governments educated, train, and grow into their vision.

***Mary O'Keefe; RN, PhD, JD, FAAN; UTMB School of Nursing, Galveston, Tx, Galveston, TX***

Dr. O'Keefe is a lawyer (JD) and a registered nurse (RN), with a doctor of philosophy (PhD) in nursing and a licensed professional counselor (LPC). She has a certification as a Clinical Nurse Specialist in Psychiatric and Mental Health Nursing (CNS Psych/Mental Health) and has extensive training in alternate dispute resolution, including mediation and arbitration. Dr. O'Keefe is a Professor in the UTMB School of Nursing, Galveston, Texas, where she has been awarded the Constance Brewer Koomey Endowed Professorship in Nursing and is recognized as an University of Texas Distinguished Teaching Professor. She is



also a Professor in the UTMB Graduate School of Biomedical Sciences, a Clinical Associate Professor in the UTMB School of Medicine, and a Visiting Professor in the Shantou University Schools of Medicine and Nursing, Shantou, China. Dr. O'Keefe has published a series of textbooks known as Nursing Practice and the Law: Avoiding Malpractice and Other Legal Risks. She has a pending publication entitled Policy, Power, & Politics: Creating the Leadership Potential in Nursing Practice.

***Teressa Sanzio; RN, MPA, JD; Law Office of Teresa M. Sanzio, P.C., Phoenix, AZ***

Ms. Sanzio, a licensed Registered Nurse and Attorney, practices law in Arizona, specializing in representing health care professionals in all regulatory matters, including, but not limited to disciplinary defense. Ms. Sanzio has served on the TAANA Board of Directors since 2009, and is currently the Past President. In 2015, Ms. Sanzio was the recipient of the Cynthia Northrop Distinguished Service Award. Ms. Sanzio is also actively involved in the legislative process and was instrumental in the passage of two new laws that impact health professionals in Arizona. Prior to becoming an attorney in 1997, Ms. Sanzio earned an Associate Degree in Nursing, a Bachelor of Science Degree in Business Administration, and a Masters Degree in Public Administration.

***Tracy L. Singh; RN, JD; Las Vegas, NV***

Tracy is a Nurse-Attorney who has dedicated her practice to helping nurses and other healthcare providers in Nevada to protect their professional licenses and avoid malpractice....caring for those who care for others since 2005. Tracy began her career as a Registered Nurse (RN) in Las Vegas where she held many positions including caring for children with aids as a home health nurse, working as a medical-surgical staff and charge nurse, as well as the nurse manager and surgical nurse-liaison for a cardiovascular surgical practice in Southern Nevada. Throughout her nursing career, Tracy was most noted for her high standards and dedication to improving patient care at all levels. During law school, Tracy worked for the U.S. Attorney's office and other attorneys as a Certified-Legal Nurse Consultant. She also clerked for the Honorable Judge Allan R. Earl in the Eighth Judicial District, Las Vegas, Nevada, the U.S. Attorney's office, John H. Cotton & Associates, and other firms in Las Vegas, Nevada. Tracy served on the Bylaws Committee for The American Nurses Association and she is the past President and current chair for the Bylaws Committees for the Nevada Nurses Association. Tracy is also a member of The American Association of Nurse Attorneys, the American Bar Association, Nevada Justice Association and the Nevada Bar Association. In her many roles, Tracy has participated in many nursing related programs, committees and initiatives throughout the state. She has testified on behalf of nurses to the Nevada Legislature and the Nevada State Board of Nursing on legislative and regulatory issues related to the practice of Nursing in Nevada. When asked why she left nursing, her response is always the same, "I did not leave nursing, I brought it with me." Her passion is to support all healthcare providers

by helping them to learn how to improve patient relations, reduce or avoid malpractice claims, and protect their professional licenses for the duration of their careers.

***Hillary Stemple; JD; Arent Fox LLP, Washington , DC***

Hillary Stemple is an associate in Arent Fox's Health Care practice group. She offers service to health care providers, including hospitals and health care systems, long term care facilities, and hospice and home care agencies. Hillary regularly advises clients on compliance with health care fraud and abuse laws, with an emphasis on the Stark law and anti-kickback statute. She also advises clients on internal and external investigations, particularly investigations related to the False Claims Act, as well as on reimbursement issues, licensing requirements, and other compliance matters. As part of her practice, Hillary helps health care clients respond to government subpoenas, address related compliance issues, and negotiate associated settlement agreements and corporate integrity agreements. She also assists clients with drafting, implementing, and evaluating compliance programs. Hillary has counseled clients on all aspects of making voluntary self-disclosures, including the drafting and submission of self-disclosures to the OIG Self-Disclosure Protocol and the CMS Self-Referral Disclosure Protocol.

***Liz Stokes; JD, RN; American Nurses Association, Washington, DC***

Liz Stokes is a Senior Policy Advisor for the American Nurses Association Center for Ethics and Human Rights. She completed her Bachelors of Science in Nursing at the University of Virginia and worked several years as a critical care nurse focusing on end-of-life care issues. Liz received her Juris Doctor from the University of Richmond and worked for several years as a Discipline Constulant for the District of Columbia Board of Nursing. She is a member of the Phi Delta Phi Legal Fraternity and currently serves on The American Association of Nurse Attorney Board of Directors. Her areas of expertise include bioethics, nursing ethics and substance abuse in nursing. She frequently presents lectures to undergraduate nurses about professional liability, advanced directives and end-of-life care decisions. Liz also serves as an Associate Editor for the Journal of Bioethical Inquiry. She is an active volunteer with the District of Columbia Bar Association and has received national recognition for her pro bono efforts.

***Kay VanWey; JD; Van Wey Law, Dallas, TX***

Kay is a patient safety advocate and medical malpractice lawyer. She is Board Certified in Personal Injury Trial law by the Texas Board of Legal Specialization. She has been named Texas Super Lawyer (2003-2016), D Best Lawyers in Dallas for Tort and Product Liability, is a member of the million dollar and multi-million dollar advocates forum. Many of her cases have been featured in the local and national media.

# CONFERENCE SURVEY

**Full Name and Credentials:** \_\_\_\_\_

**Company/Institution:** \_\_\_\_\_

**City and State:** \_\_\_\_\_

**E-mail Address:** \_\_\_\_\_

I certify that I attended the sessions I have evaluated. I will receive continuing education credit for only those sessions.

\_\_\_\_\_  
(Your signature)

*Please indicate the extent to which you agree or disagree with the following statements.*

|   | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|---|-------------------|----------|---------|-------|----------------|
| In general, I was very happy with the TAANA conference.             |                   |          |         |       |                |
| The format allowed more focused access to topics of interest to me. |                   |          |         |       |                |
| The topics met my professional needs.                               |                   |          |         |       |                |

*Please indicate your level of satisfaction with the following social events.*

|                            | Poor | Not Satisfactory | Neutral | Satisfactory | Excellent |
|----------------------------|------|------------------|---------|--------------|-----------|
| Thursday afternoon break   |      |                  |         |              |           |
| Thursday welcome reception |      |                  |         |              |           |
| Friday morning breakfast   |      |                  |         |              |           |
| Friday morning break       |      |                  |         |              |           |
| Friday luncheon            |      |                  |         |              |           |
| Friday afternoon break     |      |                  |         |              |           |
| Coach to Ft. Worth         |      |                  |         |              |           |
| Saturday morning breakfast |      |                  |         |              |           |
| Saturday morning break     |      |                  |         |              |           |

Please indicate your level of satisfaction with the following conference presentations.

|  | Did not attend | Poor | Not Satisfactory | Neutral | Satisfactory | Excellent |
|--|----------------|------|------------------|---------|--------------|-----------|
| Sociometry: Building Connections;<br><i>O'Connell</i>  |                |      |                  |         |              |           |
| Pill Mill Epidemic & Litigation; <i>VanWey</i>   |                |      |                  |         |              |           |
| Trusts and Developing a Careplan;<br><i>Klemme, Jones</i>  |                |      |                  |         |              |           |
| Legal Ethics in Representing Healthcare Clients; <i>Hessler</i>  |                |      |                  |         |              |           |
| (Poster) The ANA Code of Ethics for Nurses: Implications for Professional Practice; <i>Stokes</i>                          |                |      |                  |         |              |           |
| (Poster) The Role and Significance of the Sexual Assault Nurse Examiner in Sex Abuse Cases; <i>Edwards</i>                 |                |      |                  |         |              |           |
| What do you Mean, I Might Lose my License?; <i>D'Antonio</i>   |                |      |                  |         |              |           |
| Brain Dead and Pregnant: Legal and Ethical Implications of the Marlise Muñoz Case; <i>Janicek</i>                          |                |      |                  |         |              |           |
| Panel: The Effects of Tort Reform on Healthcare and Civil Justice; <i>Manzanares, Hoffman (Hon), Carboy, King; Kearney</i> |                |      |                  |         |              |           |
| Emergency Management of Infectious Disease; <i>Jenkins (Hon)</i>   |                |      |                  |         |              |           |
| Elder/Dependent Adult Abuse in Healthcare Institutions and Mandated Reporting Law; <i>Hestor, Higelin</i>                  |                |      |                  |         |              |           |
| Panel: Statute of Limitations & Double Jeopardy; <i>Sanzio, Gialanella, Singh, Balestra</i>                                |                |      |                  |         |              |           |
| Disclosure of Confidential Information; <i>Hovey</i>   |                |      |                  |         |              |           |
| It's Here: The Final 60-Day Overpayment Rule (What it Means for you and your Clients); <i>Stemple</i>                      |                |      |                  |         |              |           |
| Providing Care to Wards of Probate Courts; <i>O'Keefe</i>  |                |      |                  |         |              |           |
| Collateral Consequences of Criminal Convictions for Healthcare Practitioners; <i>Meyer</i>                                 |                |      |                  |         |              |           |
| Monitoring Agreements; <i>Hark</i>   |                |      |                  |         |              |           |

What did you like most about the conference?

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What can we do better next time?

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What topics of interest or speakers would you like to suggest?

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Please suggest ideas about alternative formats and/or networking opportunities that you would like to see incorporated in our annual meetings.

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Any additional suggestions you have

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# TAANA NURSING AND CONTINUING EDUCATION

## HOURS FORM

Participants are required to file their own form with their state regulatory agencies.

**Sponsor:** TAANA  
3416 Primm Lane  
Birmingham, AL 35216

**Program:** TAANA 2016 Annual Meeting and  
Educational Conference

**Location:** Dallas Texas

**Dates:** November 10-12, 2016

### TAANA COPY

| Thursday, November 10 |  |                         |               |     |
|-----------------------|--|-------------------------|---------------|-----|
| Time                  | Event  | Attended<br>(Yes or No) | CLE           | CEU |
| 1pm - 2pm             | <i>Sociometry: Building Connections</i>                |                         | 1             | 1   |
| 2pm - 3pm             | <i>Pill Mill Epidemic &amp; Litigation</i>             |                         | 1             | 1   |
| 3:30pm - 4:30pm       | <i>Trusts and Developing a Careplan</i>                |                         | 1             | 1   |
| 4:30pm - 5:30pm       | <i>Legal Ethics in Representing Healthcare Clients</i> |                         | 1<br>(ethics) | 1   |

| Friday, November 11 |  |                         |                  |      |
|---------------------|--|-------------------------|------------------|------|
| Time                | Event  | Attended<br>(Yes or No) | CLE              | CEU  |
| 8:30am - 9:30am     | <i>What do you Mean, I Might Lose my License?</i>  |                         | 1                | 1    |
| 9:30am - 10:30am    | <i>Brain Dead and Pregnant: Legal and Ethical Implications of the Marlise Muñoz Case</i> |                         | 1<br>(ethics)    | 1    |
| 10:45am - 12pm      | <i>Panel: The Effects of Tort Reform on Healthcare and Civil Justice</i>                 |                         | 1.25<br>(ethics) | 1.25 |
| 1pm - 2pm           | <i>Emergency Management of Infectious Disease</i>  |                         | 1                | 1    |
| 2pm - 3pm           | <i>Elder/Dependent Adult Abuse in Healthcare Institutions and Mandated Reporting Law</i> |                         | 1                | 1    |
| 3:30pm - 4:30pm     | <i>Panel: Statute of Limitations &amp; Double Jeopardy</i>                               |                         | 1                | 1    |
| 4:30pm - 5:30pm     | <i>Disclosure of Confidential Information</i>  |                         | 1                | 1    |

| Saturday, November 12 |  |                         |     |     |
|-----------------------|--|-------------------------|-----|-----|
| Time                  | Event  | Attended<br>(Yes or No) | CLE | CEU |
| 8:30am - 9:30am       | <i>It's Here: The Final 60-Day Overpayment Rule (What it Means for you and your Clients)</i> |                         | 1   | 1   |
| 9:30am - 10:30am      | <i>Providing Care to Wards of Probate Courts</i>   |                         | 1   | 1   |
| 11am - 12pm           | <i>Collateral Consequences of Criminal Convictions for Healthcare Practitioners</i>          |                         | 1   | 1   |
| 12pm - 1pm            | <i>Monitoring Agreements</i>   |                         | 1   | 1   |

\*There is a total of 15.25 CLE hours of which 3.25 hours are ethics\*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

I certify that I attended the sessions checked above.



# TAANA NURSING AND CONTINUING EDUCATION

## HOURS FORM

Participants are required to file their own form with their state regulatory agencies.

**Sponsor:** TAANA  
3416 Primm Lane  
Birmingham, AL 35216

**Program:** TAANA 2016 Annual Meeting and  
Educational Conference  
**Location:** Dallas Texas  
**Dates:** November 10-12, 2016

### ATTENDEE COPY

| Thursday, November 10 |  |                         |               |     |
|-----------------------|--|-------------------------|---------------|-----|
| Time                  | Event  | Attended<br>(Yes or No) | CLE           | CEU |
| 1pm - 2pm             | <i>Sociometry: Building Connections</i>                |                         | 1             | 1   |
| 2pm - 3pm             | <i>Pill Mill Epidemic &amp; Litigation</i>             |                         | 1             | 1   |
| 3:30pm - 4:30pm       | <i>Trusts and Developing a Careplan</i>                |                         | 1             | 1   |
| 4:30pm - 5:30pm       | <i>Legal Ethics in Representing Healthcare Clients</i> |                         | 1<br>(ethics) | 1   |

| Friday, November 11 |  |                         |                  |      |
|---------------------|--|-------------------------|------------------|------|
| Time                | Event  | Attended<br>(Yes or No) | CLE              | CEU  |
| 8:30am - 9:30am     | <i>What do you Mean, I Might Lose my License?</i>  |                         | 1                | 1    |
| 9:30am - 10:30am    | <i>Brain Dead and Pregnant: Legal and Ethical Implications of the Marlise Muñoz Case</i> |                         | 1<br>(ethics)    | 1    |
| 10:45am - 12pm      | <i>Panel: The Effects of Tort Reform on Healthcare and Civil Justice</i>                 |                         | 1.25<br>(ethics) | 1.25 |
| 1pm - 2pm           | <i>Emergency Management of Infectious Disease</i>  |                         | 1                | 1    |
| 2pm - 3pm           | <i>Elder/Dependent Adult Abuse in Healthcare Institutions and Mandated Reporting Law</i> |                         | 1                | 1    |
| 3:30pm - 4:30pm     | <i>Panel: Statute of Limitations &amp; Double Jeopardy</i>                               |                         | 1                | 1    |
| 4:30pm - 5:30pm     | <i>Disclosure of Confidential Information</i>  |                         | 1                | 1    |

| Saturday, November 12 |  |                         |     |     |
|-----------------------|--|-------------------------|-----|-----|
| Time                  | Event  | Attended<br>(Yes or No) | CLE | CEU |
| 8:30am - 9:30am       | <i>It's Here: The Final 60-Day Overpayment Rule (What it Means for you and your Clients)</i> |                         | 1   | 1   |
| 9:30am - 10:30am      | <i>Providing Care to Wards of Probate Courts</i>   |                         | 1   | 1   |
| 11am - 12pm           | <i>Collateral Consequences of Criminal Convictions for Healthcare Practitioners</i>          |                         | 1   | 1   |
| 12pm - 1pm            | <i>Monitoring Agreements</i>   |                         | 1   | 1   |

\*There is a total of 15.25 CLE hours of which 3.25 hours are ethics\*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

I certify that I attended the sessions checked above.





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# CONFERENCE ROSTER

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*(as of 16-October-2016)*

## Exhibitors:

Loretta D'Antonio  
Nurse Service Organization  
Hatboro, Pennsylvania  
Phone: 215-773-4114  
[loretta.dantonio@aon.com](mailto:loretta.dantonio@aon.com)

Jeremy Friesen  
Assured Analysis, LLC  
McKinney, Texas  
Phone: 9725693930  
[jeremy@wormingtonlegal.com](mailto:jeremy@wormingtonlegal.com)

Susan Gleason  
Millenium Settlements, Inc.  
Tallahassee, Florida  
Phone: 850-894-4265  
[sgleason@msettlements.com](mailto:sgleason@msettlements.com)

Maria Wormington  
Wormington Law Group  
McKinney, Texas  
Phone: 9725693930  
[jeremy@wormingtonlegal.com](mailto:jeremy@wormingtonlegal.com)

Larry Wormington  
Assured Analysis, LLC  
McKinney, Texas  
[larry@assured-analysis.com](mailto:larry@assured-analysis.com)

## Attendees:

Katherine K. Anselmi, JD, PhD, FNP, WHNP-BC  
Drexel Univ.  
Dallas, Pennsylvania  
Phone: (267) 359-5889  
[kka26@drexel.edu](mailto:kka26@drexel.edu)

Melanie L. Balestra, Partner  
Law Offices of Melanie Balestra  
Irvine, California  
Phone: 949-786-3328  
[balestralaw@cox.net](mailto:balestralaw@cox.net)

Linda Barry  
Assured Analysis, LLC  
McKinney, Texas  
Phone: 972-363-8810  
[Jeremy@wormingtonlegal.com](mailto:Jeremy@wormingtonlegal.com)

John D. Bishop  
Ray & Bishop, Professional Law  
Corporation  
Newport Beach, California  
Phone: 949 557 4888  
[jdbish@gmail.com](mailto:jdbish@gmail.com)

Christina Bricker, RN, BSN  
Houston, Texas  
[christina.bricker@hcl.edu](mailto:christina.bricker@hcl.edu)

Lorie A. Brown, BSN, MN, JD  
Brown Law Office, PC  
Indianapolis, Indiana  
Phone: (317) 465-1065  
[lorie@brownlaw1.com](mailto:lorie@brownlaw1.com)

Shawna M. Butler, RN, BSN, JD, CPHRM  
Massachusetts General Hosp.  
Boston, Massachusetts  
[smbutler@partners.org](mailto:smbutler@partners.org)

Colleen M. Carboy, RN, JD  
Carboy Law Firm  
Lewisville, Texas  
Phone: (972) 410-4200  
[ccarboy@texasnurseattorney.com](mailto:ccarboy@texasnurseattorney.com)

Gwen Collins  
[Gcollins4562@sbcglobal.net](mailto:Gcollins4562@sbcglobal.net)

Carolyn M Dolan, RN, MSN, JD, FNP, PNP  
Univ. of South Alabama  
Fairhope, Alabama  
Phone: (251) 517-5366  
[cdolan@southalabama.edu](mailto:cdolan@southalabama.edu)

Patricia E. Doran, Ms.  
Rivkin Radler  
Hackensack, New Jersey  
Phone: 201-287-2476  
[ped1022@yahoo.com](mailto:ped1022@yahoo.com)

Alice E. Dupler, JD, APRN-BC  
Texas Tech University Health Science  
Center, School of Nursing  
Valley, Washington  
Phone: (509) 385-7423  
[aedupler@gmail.com](mailto:aedupler@gmail.com)

Janet K. Feldkamp, RN, BSN, LNHA, CHC, JD  
Benesch Friedlander Coplan & Aronoff, LLP  
Columbus, Ohio  
Phone: (614) 223-9328  
[jfeldkamp@beneschlaw.com](mailto:jfeldkamp@beneschlaw.com)

Sara Frey, RN, BSN, JD  
Washington State Nurses Assoc.  
Kingston, Washington  
Phone: 206-575-7979 ext. 3039  
[sfrey@wsna.org](mailto:sfrey@wsna.org)

Victoria A Gallenberg-Warner  
Rowlett Family Law  
Rowlett, Texas  
Phone: 972-412-5084  
[victoria@rowlettfamilylaw.com](mailto:victoria@rowlettfamilylaw.com)

Kathleen M. Gialanella, Esq.,  
RN, BSN, JD, LLM  
Kathleen M. Gialanella, Esq., PC  
Westfield, New Jersey  
Phone: (908) 518-1988  
[kgialanella@verizon.net](mailto:kgialanella@verizon.net)

Vicki F. Goldstein  
West Palm Beach, Florida  
Phone: 336-765-3300  
[vickifgoldstein@gmail.com](mailto:vickifgoldstein@gmail.com)

Ruth Gomez Serra  
Law Office of Ruth Gomez Serra, RN  
Brownsville, Texas  
Phone: 956-544-1777  
[gomez511@justice.com](mailto:gomez511@justice.com)

Shadonna E Hale  
Wilson Elser  
Baltimore, Maryland  
Phone: 410-962-7023  
[shadonna.hale@wilsonelser.com](mailto:shadonna.hale@wilsonelser.com)

Karen J. Halpern, RN, BSN, MSN, JD  
KAREN J. HALPERN, RN, ESQ.  
Melville, New York  
Phone: (631) 694-0033 x 261  
[khalpern@lwrlawyer.com](mailto:khalpern@lwrlawyer.com)

Sheila M Hathaway, RN, JD, Attorney at Law  
CEO  
Raleigh, North Carolina  
Phone: (919) 237-3051  
[sheilahathaway1@gmail.com](mailto:sheilahathaway1@gmail.com)

Kamilah D Henderson  
Kamilah Henderson Law Firm, PLLC  
Frisco, Texas  
Phone: (972) 731-4382  
[kamilah@kamilahhendersonlaw.com](mailto:kamilah@kamilahhendersonlaw.com)

Paula F. Henry, RN, BSN, NP, JD  
Hershorin & Henry, LLP  
Lake Forest, California  
Phone: 949-859-5600 x 321  
[paulah@hhlawgroup.com](mailto:paulah@hhlawgroup.com)

Jennifer Herlihy  
Adler Cohen Harvey Wakeman  
Guekguezian, LLP  
Boston, Massachusetts  
Phone: (617) 423-6674  
[jherlihy@adlercohen.com](mailto:jherlihy@adlercohen.com)

Kathleen A. Hessler, RN, JD, CHC, CHPC  
Simione Healthcare Consultants  
Albuquerque, New Mexico  
Phone: (505) 239-8789  
[khessler@simione.com](mailto:khessler@simione.com)

Kelly Hoff, RN  
UNT Dallas College of Law  
[kellyhoff@my.untDallas.edu](mailto:kellyhoff@my.untDallas.edu)

Maureen Iruke, RN, MS  
Thurgood Marshall School of Law  
Texas  
[m.iruke8055@student.tsu.edu](mailto:m.iruke8055@student.tsu.edu)

Marla Jonas, Esq., JD, MSN, RN  
Halpern & Halpern  
New York, New York  
Phone: 202-642-9050  
[marlarnesq@gmail.com](mailto:marlarnesq@gmail.com)

Jean Kasper, RN, JD  
Boston, Massachusetts  
[jeankasper@hotmail.com](mailto:jeankasper@hotmail.com)

Kathleen M. Kearney, JD, MSN, RN  
Texas Tech University Health Sciences  
Center School of Nursing  
Dallas, Texas  
Phone: (214) 810-1867  
[kathleen. Kearney@ttuhsc.edu](mailto:kathleen. Kearney@ttuhsc.edu)

JoAnn Klaassen, RN, MN, JD  
UMKC, School of Nursing  
Olathe, Kansas  
Phone: (816) 235-1715  
[klaassenj@umkc.edu](mailto:klaassenj@umkc.edu)

Diane J Knoblauch, JD, MSN, RN  
Knoblauch Law Offices  
Toledo, Ohio  
Phone: (419) 842-1333  
[djk@djkllegal.com](mailto:djk@djkllegal.com)

Randi Kopf, RN, MS, JD  
Kopf HealthLaw, LLC  
Rockville, Maryland  
Phone: (301) 251-2788  
[kopf@kopfhealthlaw.com](mailto:kopf@kopfhealthlaw.com)

Roslyn Lampkin-Smiley  
Joliet, Illinois  
[rlerrn2@yahoo.com](mailto:rlerrn2@yahoo.com)

Elizabeth S. Lawton, RN, BSN, JD  
Shuman McCuskey & Slicer, PLLC  
Charleston, West Virginia  
Phone: (304) 345-1400  
[elawton@shumanlaw.com](mailto:elawton@shumanlaw.com)

Ulla R. Lindsey, RN, Esq.  
Lindsey & Assoc.  
Acton, California  
[ulindsey@qnet.com](mailto:ulindsey@qnet.com)

Taralynn R. Mackay, RN, JD  
McDonald, Mackay Porter & Weitz, LLP  
Elgin, Texas  
Phone: (512) 281-5999  
[mackay@healthlicensedefense.com](mailto:mackay@healthlicensedefense.com)

Imrana Manzanares  
[imanzanares@abrahamwatkins.com](mailto:imanzanares@abrahamwatkins.com)

Diana Martinez, RN, JD  
Law Offices of Diana Martinez Esq., PC  
New York, New York  
Phone: (212) 683-1153  
[dmartinezesq@aol.com](mailto:dmartinezesq@aol.com)

Susan B. Matt, PhD, JD, MN, RN, CNE  
Seattle University College of Nursing  
Seattle, Washington  
Phone: (206) 296-2198  
[matts@seattleu.edu](mailto:matts@seattleu.edu)

Rosemary McCarthy, MS, JD  
Law Offices of Rosemary C. McCarthy  
Houston, Texas  
[rcm99@hotmail.com](mailto:rcm99@hotmail.com)

Kathleen A. McCormac, BSN, JD  
McCormac & Assoc.  
San Francisco, California  
Phone: (415) 399-1722  
[kmccormac@mccormaclaw.com](mailto:kmccormac@mccormaclaw.com)

Ronnie McKinnon,  
RN,JD,CPHRM,CPSO,CPPS  
Stony Brook University Health Sciences  
Center  
Stony Brook, New York  
Phone: (631) 444-6689  
[ronnie.mckinnon@stonybrook.edu](mailto:ronnie.mckinnon@stonybrook.edu)

Marc M. Meyer, RN, JD  
Law Office of Marc Meyer, PLLC  
Magnolia, Texas  
Phone: (281) 259-7575  
[marc@marcmeyerlawfirm.com](mailto:marc@marcmeyerlawfirm.com)

Janet E. Michael, RN, MS, JD  
Law Office of Janet E. Michael  
Portland, Maine  
Phone: (207) 773-9766  
[jemrnjd@yahoo.com](mailto:jemrnjd@yahoo.com)

Daitasha Miller  
Bronx, New York  
Phone: 7184153365  
[daitasham@aol.com](mailto:daitasham@aol.com)

James A Mullen, III  
Curtis Law Group/UNT Dallas College of Law  
Dallas, Texas  
[jamesmullen@mylaw.untDallas.edu](mailto:jamesmullen@mylaw.untDallas.edu)

Jacqueline Olexy  
Madison & Mroz, P.A.  
Albuquerque, New Mexico  
Phone: 505-242-2177  
[jao@madisonlaw.com](mailto:jao@madisonlaw.com)

Bola Oyeleye, Dr.  
University of Texas Health Science Center  
at Houston  
Houston, Texas  
[bolaoyeleye@hotmail.com](mailto:bolaoyeleye@hotmail.com)

Cassandra G Pasley, BSN, JD  
Florida Department of Health  
Tallahassee, Florida  
Phone: 850-245-4209  
[cassandra.pasley@flhealth.gov](mailto:cassandra.pasley@flhealth.gov)

JoAnn Pietro, RN, Esq  
JoAnn Pietro RN ESQ  
SPRINGFIELD, New Jersey  
Phone: 9732589000  
[jp@pietrolawfirm.com](mailto:jp@pietrolawfirm.com)

Reena Pushpangadan, Ms.  
Philadelphia, Pennsylvania  
[rpushpangadan@gmail.com](mailto:rpushpangadan@gmail.com)

Jackie L. Russell, RN, JD  
Law Student Liaison, Nursing and Allied  
Healthcare Professional's Task Force of the  
ABA's Health Law Section  
Sunriver, Oregon  
Phone: 541-280-6200  
[jrussell.legalnurse@yahoo.com](mailto:jrussell.legalnurse@yahoo.com)

Esperanza N. Sanchez  
Washington, District Of Columbia  
[sancheze@cua.edu](mailto:sancheze@cua.edu)

Teressa M. Sanzio, RN, BSBA, MPA, JD  
Law Office of Teressa M. Sanzio, PC  
Phoenix, Arizona  
Phone: (602) 993-3215  
[tsanziolaw@gmail.com](mailto:tsanziolaw@gmail.com)

Caprese Siler-Ball  
The Doctors Company  
Lake Oswego, Oregon  
Phone: 9712236331  
[CSiler-Ball@thedoctors.com](mailto:CSiler-Ball@thedoctors.com)

Tracy L. Singh, RN, JD  
Law Offices of Tracy L. Singh, LLC  
Las Vegas, Nevada  
Phone: (702) 444-5520  
[tsingh@tlsinghlaw.com](mailto:tsingh@tlsinghlaw.com)

Dennis Siriba, RN  
Thurgood Marshall School of Law  
[dsiriba@tmslaw.tsu.edu](mailto:dsiriba@tmslaw.tsu.edu)

Hillary M. Stemple  
Arent Fox LLP  
Washington, District Of Columbia  
Phone: 2023503638  
[hillary.stemple@arentfox.com](mailto:hillary.stemple@arentfox.com)

Jonathan D. Stewart, JD, MS, RN  
The Law Office of Jonathan D. Stewart,  
PLLC  
Vancouver, Washington  
Phone: (360) 524-2687  
[jds@jdstewartlawfirm.com](mailto:jds@jdstewartlawfirm.com)

Liz Stokes  
American Nurses Association  
Silver Spring, Maryland  
Phone: 3016285384  
[stokes.felicia@gmail.com](mailto:stokes.felicia@gmail.com)

Eileen M. Talamante  
Goodman Allen Donnelly PLLC  
Glen Allen, Virginia  
Phone: 804.565.3526  
[etalamante@goodmanallen.com](mailto:etalamante@goodmanallen.com)

Mary L. Taylor, BSN, MA, JD  
Coe College  
Cedar Rapids, Iowa  
Phone: 319 389  
[mlt3809@msn.com](mailto:mlt3809@msn.com)

Elaine Thurber-Foster  
M. Casey Law  
Spokane, Washington  
Phone: (509) 368-9284  
[lightitup77@gmail.com](mailto:lightitup77@gmail.com)

Megan E Verbos  
Celenatano, Stadtmauer, & Walentowicz,  
LLP  
Hamilton, New Jersey  
[mev5000@gmail.com](mailto:mev5000@gmail.com)

Kevin G Voelker  
Schertz, Texas  
[kgvlaw@satx.rr.com](mailto:kgvlaw@satx.rr.com)

Jacqueline Walus-Wigle, RN, JD, CPHQ  
La Jolla, California  
[jmwigle@earthlink.net](mailto:jmwigle@earthlink.net)

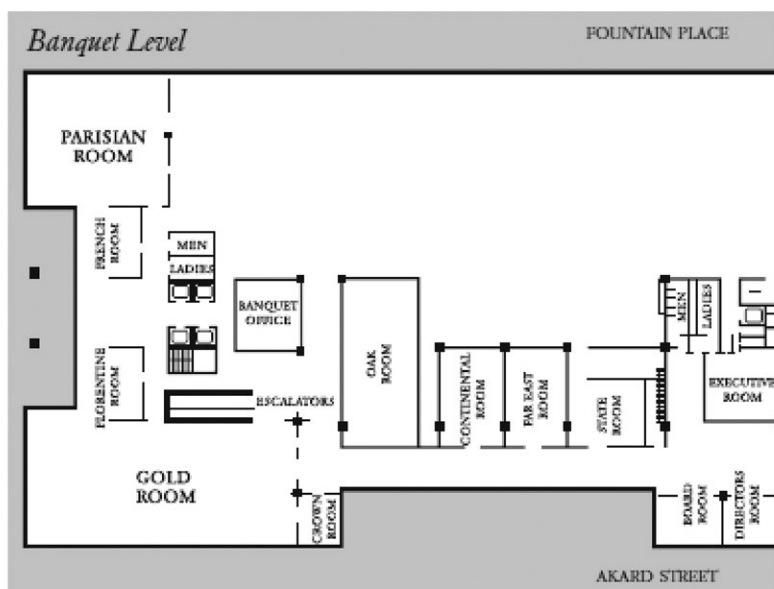
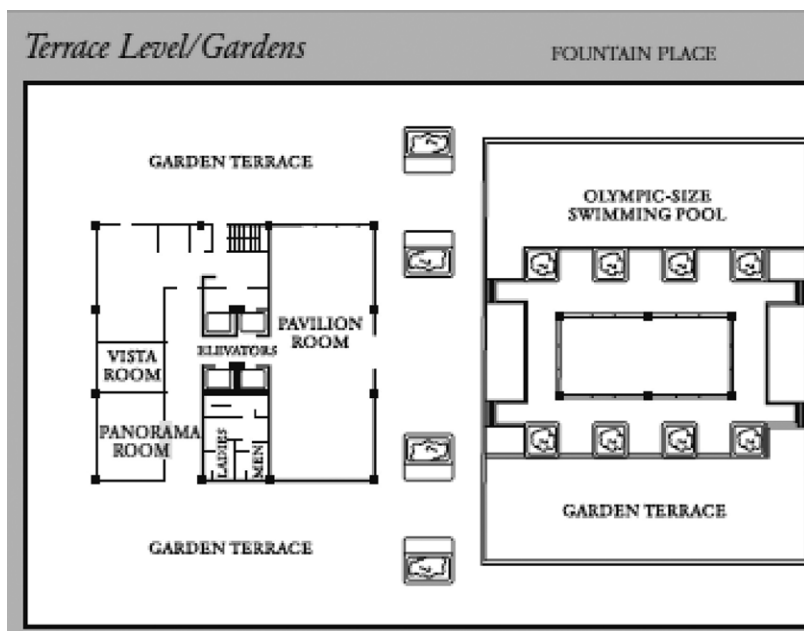
Diane T. Warlick, RN, BSN, JD  
retired/ part time contract attorney  
East Berlin, Pennsylvania  
Phone: (504) 756-6611  
[dtwarlick@gmail.com](mailto:dtwarlick@gmail.com)

Toya White, RN, FNP  
UNT Dallas College of Law  
[toyawhite@mylaw.untDallas.edu](mailto:toyawhite@mylaw.untDallas.edu)

Nancy Roper Willson, RN, JD, MSN, MA  
Law Office of Nancy Roper Willson  
Dallas, Texas  
Phone: (214) 941-9900  
[nwillson@roperwillson.com](mailto:nwillson@roperwillson.com)

# HOTEL MAP

*All TAANA conference functions will take place in the Parisian and Pavilion Rooms.*



# NOTES



THE AMERICAN ASSOCIATION OF NURSE ATTORNEYS  
2016 ANNUAL MEETING & EDUCATIONAL CONFERENCE

3416 Primm Lane  
Birmingham, AL 35216 USA

