

# Life Care Planning Summit 2002

*Susan Riddick-Grisham, RN, CCM, CLCP*  
*Program Chair*

## Introduction

Life care planning has become a valuable and necessary component of catastrophic case management and rehabilitation. Over the past 20 years, there has been significant growth in this transdisciplinary specialized field of practice. As the field has grown, professionals involved in the practice of life care planning have participated in the development of standards.

On April 12, 2000, life care planners from across the United States came together to participate in the first national life care planning summit. This professional summit provided a forum for in-depth discussion pertaining to five topic areas: Professional Preparation, Basic Tenets and Procedures for completing life care plans, Ethics, Reliability and Validity of the life care plan, and Information Dissemination. Out of this historic endeavor, a consensus document was published to guide the future development of life care planning, education, research and practice.

Continuing the ongoing progress in life care planning education, standards development, professionalism, and research, an online national survey of life care planners was conducted in November 2001. Results of the survey were peer-reviewed and published, along with the survey instrument, in an article titled *Life Care Planning Survey 2001: Process, Methods and Protocols* (*Journal of Life Care Planning*, 2002, 1(2), 97-148). The results specifically described the current state of life care planning practice along with protocols/procedures used by life care planners.

On May 19, 2002, 120 life care planners came to together for the second national life care planning summit. Building on all of the significant accomplishments of the April 2000 meeting, **Summit 2002** again created a forum for discussion among professionals about issues which impact the field of life care planning.

The Summit was sponsored by Intelicus/University of Florida in conjunction with the International Association of Rehabilitation Professionals (IARP), International Academy of Life Care Planners (IALCP), and the Commission on Health Care Certification (CHCC).

In preparation for this professional meeting, an educational committee worked to identify five focus areas to be addressed in the roundtable discussions. This committee consisted of Susan Riddick-Grisham, program Chair, Debbie Berens, Paul M. Deutsch, Tim Field, Patricia McCollom and Roger Weed.

The five topic areas and objectives included:

1. Life Care Plan Methodology/Functions - to explore life care plan methodology as outlined in the IALCP Standards of Practice and to determine if revisions are needed to better reflect changes in the field.
-

2. Professional Development - to explore professional development of the life care planner.
3. Scope of Practice/Specialty Skills - to explore the current requirements for becoming qualified and/or certified as a life care planner.
4. Ethics - to explore ethics involved in the practice of life care planning.
5. Future of Life Care Planning - to explore future developments, issues, and trends in life care planning.

## **Method**

To better prepare attendees for the program, relevant materials were assembled and sent to all registered participants in advance of the Summit. Materials consisted of:

1. IALCP Standards of Practice
2. Code of Ethics for Rehabilitation Counselors
3. CHCC Guidelines

Facilitators and recorders for the roundtable discussions were identified by the program Chair. They consisted of qualified individuals from the supporting organizations as well as other experienced life care planning professionals. Due to the size of the number of participants, each topic area had two roundtables.

Prior to the Summit the attendees participated in a day long educational program focused on advanced practice issues. Presentations covered issues such as research methodology for life care planners, evidence-based guidelines, care management applications and factors in assessing medical equipment choices.

The Summit convened with a keynote presentation on the meaning and value of standards. In preparation for the roundtable discussions, each attendee was assigned a number within their professional discipline so that an integrated mix of experience, training and knowledge was assured. The small group sessions were 30 minutes each and every attendee participated in discussions on all topic areas. The method for soliciting information from the group was a modified nominal group technique.

At the end of the day, the attendees were reassembled into one large group. A brief summary of the results of each topic area was presented by one of the facilitators for each topic area.

A thorough analysis of the findings was later completed by each of the facilitators and provided to the program Chair. A comment noted by each of the facilitators, and many of the attendees, was the suggestion for the next Summit to either allow more time within the roundtables for greater substantive discussions or limit the size of the roundtable groups. Another observation made by some participants was the apparent variable application of the nominal group techniques by the roundtable facilitators. Understandably, these observations created the need for closer inspection of results published when analyzing data. Given these considerations, the summary of the results published on the following pages is accurate and adequately represents the views of the life care planning professionals who participated in Summit 2002.

After the Summit results were documented, a draft of the proceedings was developed and sent to key individuals within the sponsoring organizations and life care planning industry for review and comment. Based on feedback, the proceedings were revised as appropriate and the final step was to solicit endorsement of the proceedings from the sponsoring organizations as well as to ensure their support to the continued study, research and validation of life care planning.

---

---

## Results

The following sections represent a summary of the results of the focus groups. For purposes of this document, the following terms are defined:

1. Areas of Consensus means that all attendees present agreed to the areas as reported and associated with the bullet point.
2. Areas of Discussion means that an attendee or attendees present offered suggestions or recommendations that did not have unanimous support. In some cases, most attendees agreed and in others, the point could be an individual's suggestion with little group support.

**FOCUS AREA:** Life Care Plan Methodology/Functions  
**Group Facilitators:** Terry Winkler, MD, CLCP  
Karen Preston, MS, RN, CRRN, PHN  
**Recorders:** Amy Sutton, RN, BSN, MA  
Lynn Esko, CRC, LMHC, CCM, CLCP

The charge given this group was to explore life care plan methodology as outlined in the IALCP Standards of Practice and to determine if revisions are needed to better reflect changes in the field. Scope of discussion would include areas relating to data collection, assessment, planning, plan research, facilitation, evaluation and testimony. Further, that the group, individually and collectively, establish priorities for these areas.

## Overall Premises

Qualified life care planners must demonstrate a level of competence combining education, professional preparation, and experience. As this area of specialized practice grows it is essential that there is a consistency of practice across all disciplines entering the field. The IALCP Standards of Practice represent the parameters of responsibility for which life care planners are accountable.

## Areas of Consensus

To create a foundation for life care plan content there needs to be:

1. Integrity of data- delineating what data was gathered, from what resources including research and literature.
  2. A method to handle divergent opinions between experts or between experts and the literature.
  3. A method to properly interject personal expertise.
  4. Use of credible evidence-based guidelines.
  5. Having access to conduct an in-person interview can enhance the life care planning process.
  6. Standard tools for gathering and reporting information.
  7. Protocols for doing cost research.
  8. Protocols for handling "the impact of aging" aspects in a life care plan.
  9. Guides outlining when to use local versus national resources.
  10. Collaboration.
-

There needs to be a review of all terminology used to describe methodology of life care planning as stated in the IALCP Standards.

The life care planner should understand the difference between local standards for treatment and management of care versus the national standard (Centers of Excellence).

The life care planner should understand the optimal outcomes achievable to each injured person.

## **Priority Areas**

### *Priority #1: Life Care Plan Methodology/ IALCP Standards*

#### **Areas of Discussion:**

1. Life care planners should utilize a peer review process.
2. Life care planners should seek other experts' input as needed or as appropriate to augment one's experience.
3. Should the life care plan include a section discussing the client's perspective?
4. The Standards do not reflect the value of doing a face-to-face interview with the client.
5. Further discussion needs to be conducted to evaluate the use of the words "thorough" and "complete" as stated in the IALCP Standards.
6. Standards should be general.
7. Need to differentiate between standards of practice and standards of methodology.
8. Need for total review and rewrite of the Standards.
9. The language in the Standards should be "request for" such items as medical records and in-person interview along with "seeks other experts' input as needed or as appropriate to augment one's experience."
10. Written standards should not be so narrow as to limit the life care planner's ability to practice.
11. Should there be standard templates for gathering data?
12. Indiscriminate use of medical literature with no understanding of its validity or applicability.
13. Should financial information be obtained from the client and then used in the life care plan?

### *Priority #2: Qualifications*

#### **Areas of Discussion:**

1. Re-evaluation of grandfathering (CHCC). (Editor's Note: CHCC does not allow grandfathering).
  2. Review of existing requirements and raising standards for CHCC credentialing.
  3. State licensure requirements for nurses doing life care plans.
  4. Experience with collaborative teamwork. What should that include?
  5. Five (5) years case management experience require for certification.
  6. Bachelor of Science requirement for nurses and Masters degree for other health disciplines to qualify for training.
  7. Ongoing peer review for maintenance of certification.
  8. Active licensure and certification in primary field of practice.
  9. Many life care planning training issues need to be addressed.
-

---

*Priority #3: Life Care Plan Critique*

**Areas of Discussion:**

1. A critique should address the methodology of the life care planner.
2. A critique should be a professional review, based on objectivity.

**FOCUS AREA:** Professional Development  
**Group Facilitators:** Paul Deutsch, Ph.D., CRC, LMHC, CLCP  
Tim Field, Ph.D  
**Recorders:** Dan Bagwell, RN, CLCP  
V. Robert May, Rh.D. CDE

The charge given this group was to explore professional development of the life care planner. Scope of discussion would include areas relating to training and education, certification and research. Further, that the group, individually and collectively, establish priorities for these areas.

**Overall Premises**

Professionals in various health care fields, including nursing, medicine, rehabilitation counseling, social work, physical and occupational therapy are involved in developing life care plans. As this specialized field of practice continues to grow and develop it is of specific purpose that a coordinated effort with standardized approaches be promoted. Education of new and experienced life care planners is an essential part of continuing professional development. The community of life care planners is now looking for more advanced educational opportunities along with ways to be involved in life care plan certification and research.

**Priority Areas**

*Priority Area #1: CHCC compliance with or under accountability to the NCCA.*

**Areas of Consensus:**

1. The field of life care planners should monitor the formal application to NCCA.
2. CHCC should be accountable to NCCA.

*Priority Area #2: Advanced Training/Continuing Professional Education*

**Areas of Consensus:**

1. Training needs to be focused on disability specific courses.
  2. Programs covering advanced/complex issues are needed.
  3. Regionally based offerings are needed.
-

**Areas of Discussion:**

1. Continuing education focused on clinical updates.
2. Continuing education focused on specialized areas of the life care plan.
3. Continuing education focused on changes in the legal field.
4. Continuing education focused on report writing.
5. Continuing education in non- traditional treatment of disease or disability states.
6. Need for new instructors.
7. Research-based continuing education.
8. Multiple forums to meet continuing education needs
9. Ethics continuing education as part of the CHCC re-certification requirements.
10. Education programs for life care planners in areas other than litigation.
11. Seminars with breakout sessions to give attendees more options.
12. Consider having certified instructors to provide on-going life care plan training.
13. Prep course for certification exam with study guide.

*Priority Area #3: Development of a Peer Review Process***Areas of Consensus:**

1. The field needs a formalized, blind peer review process that would be available to all life care planners.

**Areas of Discussion:**

1. Development of mentoring programs.
2. Availability of CEUs for individuals acting as mentors or peer reviewers.

*Priority Area #4: Centralized Data/Information Repository***Areas of Discussion:**

1. Development of a web site for life care planners.
2. Need to identify a way to communicate with all life care planners about national data.
3. Possible use of a listserv for life care planners.

*Priority Area #5: Research***Areas of Consensus:**

1. Life care planners must be involved in research.
2. Continuing education programs focused on demonstrating how to include research in the life care plan and how to present it.

**FOCUS AREA:****Scope of Practice/Specialty Skills**

Group Facilitators:

Ann Neulicht, Ph.D., CLCP, CRC, CVE, CDMS, LPC

Patricia McCollom, MS, RN, CRRN, CDMS, CCM, CLCP

---

---

Recorders: Patricia Costantini, RN, CRC, CCM, CLCP, LNCC  
Steve Shedlin, MS, CRC

The charge given this group was to explore the current requirements for becoming qualified and/or certified as a life care planner. Scope of discussion would include CHCC requirements for certification and Scope of Practice definitions published by CHCC and IALCP. Further, that the group, individually and collectively, establish priorities for these areas.

### **Overall Premises**

In light of the Scope of Practice definitions within the Standards of Practice published by the CHCC and IALCP, what do you believe are the qualifications to practice in the specialty area of life care planning? (question agreed upon by the facilitators, prior to the session)

### **Priority Areas**

*Priority Area #1: Qualifications/Education*

#### **Areas of Consensus:**

1. Professional licensure and/or certification (in good standing) in primary field of practice.
2. Advanced education and health care/rehabilitation background.

#### **Areas of Discussion:**

1. No consensus about the definition of advanced education and rehabilitation background.
2. No agreement regarding minimum college degree needed.
3. Four year college degree for registered nurses and Masters for other health disciplines was discussed.
4. **Active** participation in professional organizations.

*Priority Area #2: Qualifications/Work experience*

#### **Areas of Discussion:**

1. **Recent** experience in catastrophic health/case management.
2. Experience in collaborative teamwork (rehabilitation based).
3. Five to six years of clinical experience was considered a minimum by some.

*Priority Area #3: Certification by an Accredited Body*

#### **Areas of Discussion:**

1. Certification should flow from a core curriculum created by practicing professionals.
  2. Certifying body should not be proprietary.
  3. Certifying body should be made up of practicing life care plan practitioners.
  4. Re-evaluation of those "grandfathered" by CHCC. (Editor's Note: This has already
-

- been acted upon by CHCC).
- 5. CHCC should be in compliance with NCCA.
- 6. Additional research into the different life care planning certifications.
- 7. Raise the standard of the CLCP certification.
- 8. Should life care planners be certified in specialty areas?
- 9. Mentoring (after course work) should be required for certification.

#### *Priority Area #4: Education and Training*

##### **Areas of Discussion:**

1. Structured training classes specific to life care planning (minimum of 120 hrs).
2. Training in elements of life care plan development including report writing, health care reimbursements, statistics and evidence-based methodology.
3. Peer review.
4. Ongoing continuing education specific to life care planning.

FOCUS AREA:                   **Ethics**  
 Group Facilitators:       Chris Reid, Ph.D  
                                       Linda Shaw, Ph.D  
 Recorders:                    Carol Hyland, CDMS, CLCP  
                                       Dawn St. Clair, RN, CRRN, CDMS, CCM

The charge given this group was to explore ethics involved in the practice of life care planning. Scope of discussion would include areas relating to framework for an ethical practice, rules of professional conduct, avenues to resolve ethical conflicts and resources

##### **Overall Premises**

All qualified life care planners seek to develop an ethical practice to ensure acceptable professional conduct. Certified life care planners are held to the Code of Professional Ethics as outline by the CHCC.

##### **Priority Areas**

#### *Priority Area #1: Framework for an Ethical Practice*

##### **Areas of Consensus:**

1. Stay within one's primary field of practice.
  2. Who is the actual client? Need to clearly define for whom the plan is being written and clearly communicate that to all parties involved.
  3. Dual (or multiple) relationships should be better defined in the CHCC Code.
  4. Conduct should be objective and unbiased regardless of who has hired you.
  5. Need to understand and apply the rules of confidentiality.
  6. Maintain current certifications and continuing education.
  7. Life care planning is not an "industry" as listed in the CHCC Code; it is an area of
-

- professional practice.
8. Need to maintain competency related to one's caseload.
  9. Need better definition in the CHCC Code about what creates a conflict of interest situation.

**Areas of Discussion:**

1. Need to ensure that all life care planners understand the ethical standards relevant to life care planning and the practitioner's own licensure/certification.
2. Need practice guidelines that are more specific regarding ethical rules.

*Priority Area #2: Rules of Professional Conduct***Areas of Consensus:**

1. Lack of CHCC accountability in determining management of ethical violations and complaints. Processes are not understood by individuals outside of CHCC and outcomes of the processes are not publicized.
2. Concern about AANLCP assertion that only nurses are qualified as life care planners.

**Areas of Discussion:**

1. There are many different professional disciplines practicing in life care planning, with separate ethical codes associated with each discipline. When practicing as a life care planner and there is a potential ethical code conflict, to which Code is one held? And does the Code consider the practice of life care planning?
  2. Is there anonymity in reporting unethical behavior?
  3. Can one be sued for reporting unethical behavior?
  4. Life care planning training needs to include ethics.
  5. Needs to be a clear definition of plagiarism in the field.
  6. The life care plan report should include a list of medical records reviewed and vendors contacted.
  7. Needs to be a way to unify life care planners.
  8. Medical recommendations need to have an appropriate foundation.
  9. What does a life care planner do when he/she disagrees with a physician recommendation?
  10. In Canada, the life care plan certifications are not honored. What is the impact on practice standards?
  11. To what ethical standard is someone who has not received life care planning training or certification held?
  12. Life care planners are held to the ethical standards of the CHCC yet many feel they did not participate in the development of those standards.
  13. How does one address an individual who is conducting himself or herself unethically?
  14. Are there individuals who have been improperly certified, and if so, what can be done about this?
  15. How do we develop plans for children without diminishing hope? Are we doing harm?
  16. What are the guidelines regarding use of interpreters when obtaining consent releases from bilingual clients?
-

17. Are there mentors on ethical issues?
18. Do life care planners have a right to report unethical behavior to other certifying boards? Does this apply if the individual life care planner is not CHCC certified?

**FOCUS AREA:** **The Future of Life Care Planning**  
**Group Facilitators:** Horace Sawyer, Ph.D., CRC  
 Debbie Berens, MS, CRC, CCM, CLCP  
**Recorders:** Bill Goodrich, MA, CLCP, CRC, CCM, DABVE  
 Terry Arnold, RN, CDMS, CRRN, CLCP

The charge given to this group was to explore future developments, issues, and trends in life care planning. Scope of discussion would include areas relating to professionals, markets, services, resources, etc. Further, that the group, individually and collectively, establish priorities for these qualifications.

### **Overall Premises**

Qualified life care planners must demonstrate a level of competence combining education, professional preparation, and experience. Continuing education and professional training are essential. Future marketing will position life care planning at the next level of development. New markets and educating the public and other professionals are both important future dimensions. A mentoring process is needed, as well as an established peer review, with qualified professionals in life care planning.

Future research initiation and establishing a universal database will also be an important development for the successful future of life care planning. Accountability and compliance standards will facilitate a higher level of acceptance of life care plans in the future.

### **Priority Areas**

*Priority Area #1: Continuing Education and Professional Training in Life Care Planning*

#### **Areas of Discussion**

1. More cost effective and more geographically accessible training opportunities for potential life care planners in addition to what is now available.
2. Offer distance learning formats and regional learning opportunities for life care planners.
3. Continuing education is essential for maintaining qualified life care planners.
4. Broader scope of training opportunities, i.e., ergonomics, vocational, economic issues, etc., to better prepare and qualify life care planners.
5. More applied, hands-on training needed.

*Priority Area #2: Marketing Life Care Plans, Developing New Markets for Life Care Planning, and Educating the Public and Other Professionals*

#### **Areas of Discussion:**

1. Develop marketing to attorneys and the public regarding the benefit and utilization of
-

- 
- life care plans as a case management tool in areas such as geriatric and elder care, Medicare trusts, individuals who are developmentally delayed, etc.
2. Develop new life care plan markets in patient advocacy to assist with planning for long term care, monitoring care on an ongoing basis, i.e. heart surgery or some acute illness, or long-term placement and/or finding alternatives for care, taking into consideration specific diseases or illnesses.
  3. Explore new markets for life care plans outside the litigation arena.
  4. Educate consumers on a national and international level.

*Priority Area #3: Mentoring Life Care Planners and Peer Review*

**Areas of Discussion:**

1. Develop and implement a formal mentoring program for development of new life care planners to include training of mentors, specifications/qualifications for mentors, determination of whether or not mentors could receive CEUs and development of a category for CEUs and establishment of fees for mentoring services.
2. Development of a list serve that would provide names of qualified and approved mentors.
3. Development of new leadership positions and recruit qualified life care planners to assume leadership roles and continue to promote the industry and ethical life care planning practices.
4. Initiate peer review/work product review to allow qualified life care planners to read and review life care plans, provide feedback and make comments/suggestions for improvements/enhancement.

*Priority Area #4: Initiate Research and Universal Data Base*

**Areas of Discussion:**

1. Continue research on reliability and validation of life care plans.
2. Initiate research on long term results of the life care plan, cost research, and consistency of life care plans.
3. Compile a universal database for resources and relevant life care planning articles with ability to have Internet availability to obtain actual articles.
4. Promote national organization specific to life care planning to serve as a national voice for life care planners to educate consumers, attorneys, legislators and professionals about life care planning and potentially serve as a universal database.

*Priority Area #5: Accountability and Standards for Compliance*

**Areas of Discussion:**

1. Develop more defined certification process including analysis of qualifications and experience as criteria for taking the certification test. Must have some experience in the field of life care planning prior to taking the certification exam.
  2. Promote published standards of practice and ethics for life care planners.
  3. Enforce standards of practice and ethics for life care planners.
-

4. Continually review standards of practice for development and implementation of higher standards and maintenance of standards.
5. Obtain national accreditation and oversight process for certification agency.

**Note:** Very little difference between Priorities 3, 4, and 5.

**Other Areas of Priority Discussed:**

1. National Organization for Life Care Planning (national voice for life care planners).
2. Collaboration and information-sharing between and among life care planners.

**Acknowledgements**

I would like to acknowledge colleagues who participated in the Summit 2002 and thank Roger Weed, Ph.D and Paul Deutsch, Ph.D. for their pioneering leadership in the field of life care planning and education for life care planners. Special thanks to Sheri Jasper for her skill and efforts to make the conference a success.

---

DEPARTMENT OF COUNSELING  
AND PSYCHOLOGICAL SERVICES  
College of Education

University Plaza  
Atlanta, GA 30303-3083  
Phone: 404/651-2550  
Fax: 404/651-1160



March 14, 2003

Susan Grisham, RN, CCM, CLCP  
Chair, 2002 Life Care Planning Summit  
3126 West Cary Street, #137  
Richmond, Virginia 23221

Re: Proceedings

Dear Ms. Grisham:

As the Georgia State University representative, I am pleased to endorse the proceedings of the 2002 Summit. Having the opportunity to participate with *the* leaders within the life care planning field was a distinct honor.

In addition, the professionals' ability within this specialized industry to direct their own destiny by forging collaboration with a wide range of organizations and professionals from various disciplines is commendable. Your capabilities as Chair was paramount to its success and the results demonstrate your leadership. I look forward to future Summits.

Sincerely,

A handwritten signature in black ink, appearing to read "Roger Weed".

Roger Weed, Ph.D., LPC, CRC, CDMS, CLCP, CCM, FIALCP  
Professor and Coordinator Graduate Rehabilitation Counselor Training



**INTELICUS**  
Knowledge That Earns

13 January 2003

Ms. Susan Riddick-Grisham  
Chair, Life Care Planning Summit 2002  
Life Care Manager, LLC  
3126 West Cary Street, #137  
Richmond, VA 23221

Dear Susan,

On behalf of Intelicus, I would like to fully endorse the Proceedings of the Life Care Planning Summit, held in Chicago on May 18-19, 2002. We are pleased and proud to have been a part of this important effort and hope that it will serve as a foundation document to guide the future development of Life Care Planning education, research and practice.

Sincerely,

Linda R. Shaw, Ph.D.  
Life Care Planning Faculty & Curriculum Chair



## International Association of Rehabilitation Professionals

January 22, 2003

Susan Riddick-Grisham  
3126 West Cary Street #137  
Richmond, VA 23221

Dear Susan:

On behalf of the International Association of Rehabilitation Professionals, I am pleased to endorse, without reservation, the results/proceedings of the Life Care Planning Summit 2002.

The focus of this Summit, *Standards of Practice and Certification*, is timely as is the goal of providing a forum to discuss relevant issues, identify areas of consensus as well as needs for further discussion regarding scope of practice, methodology, ethics and the future of life care planning.

The proceedings reflect issues that are of concern to Life Care Planners. We encourage efforts to develop an action plan to address the recommendations of the Summit and look forward to ongoing dialogue/future collaboration in this endeavor.

Susan, thank you for your innovative energy, dedication, and ongoing commitment to practitioners in the field of life care planning!!

Best Regards,

A handwritten signature in black ink, reading "Ann T. Neulicht". The signature is written in a cursive, flowing style.

Ann T. Neulicht, PhD, CLCP, CRC, CVE, CDMS, LPC, D-ABVE  
International Association of Rehabilitation Professionals Representative



College of Health Professions  
Department of Rehabilitation Counseling

PO Box 100175  
Gainesville, FL 32610-0175  
352.265.0745  
352.265.0744 Fax

January 30, 2003

Ms. Susan Riddick-Grisham  
Life Care Manager, L.L.C.  
3126 West Cary St., #137  
Richmond, Virginia 23221

Dear Ms. Riddick-Grisham,

On behalf of the University of Florida, we continue to fully support and endorse the efforts by professionals in life care planning to explore strategic focus areas and generate consensus outcomes. As these professionals represent various health care professions and areas of the country, the summits we have held are an important step in the future development of life care planning. I anticipate that these proceedings will facilitate a more positive and collaborative approach to the practice of life care planning.

Based on my experience at the Life Care Planning Summit held in Chicago on May 18-19, 2002, I would endorse the outcomes of this conference. It serves as a foundation for further direction of life care planning by professionals practicing this consultation specialty.

I would encourage other universities to become involved in curriculum and research development in life care planning and other areas of rehabilitation consultation. I appreciate your commitment and efforts in coordinating this important conference.

Sincerely,

A handwritten signature in cursive script, appearing to read 'Horace W. Sawyer'.

Horace W. Sawyer, Ed.D.  
Professor and Chair

---



# Commission on Health Care Certification

Peter B. Lubinkas  
Executive Director

Commissioners Thursday, January 16, 2003

R. Brown, M.S.  
Kinesiology and Exercise  
Physiology

L. Carpenter, M.Ed.  
Case Management

P.B. Fitzgerald, D.C.  
Chiropractic

T. E. Forte, M.D.  
Occupational Medicine

S. Godfrey, O.T.R.  
Occupational Therapy

O. Hunter, M.D.  
Physical Medicine &  
Rehabilitation

Betty Killete-Mitchell,  
R.N.  
Life Care Planning

Terry Winkler, M.D.  
Life Care Planning

M. Martelli, Ph.D.  
Psychology

Theodore Becker, Ph.D.  
Research and Statistics

Bill Mercer, P.T.  
Physical Therapy

R.D. Michaels, M.A.  
Vocational Evaluation

Horace Sawyer, Ed.D.  
Life Care Planning

Darrell Taylor, Ph.D.  
University Studies

Susan Riddick-Grisham, RN, CCM, CLCP  
Life Care Manager, LLC  
3126 West Cary Street, Suite 317  
Richmond, VA 23221

Re: 2002 Life Care Planning Summit

Dear Ms. Riddick-Grisham:

I want to thank you for summarizing the results of the 2002 Life Care Planning Summit held in Chicago, Illinois. While I was unable to attend, I understand the discussions were very productive. The Commission on Health Care Certification (CHCC) supports your efforts to organize and to provide input to the Commission on a variety of issues.

We thank all those who participated and look forward to future participation in life care planning summits.

Sincerely,

Peter B. Lubinkas  
Director



February 25, 2003

Susan Riddick-Grisham  
Life Care Manager, L.L.C.  
3126 West Cary St., #137  
Richmond, VA 23221

Dear Susan:

The American Association of Nurse Life Care Planners, AANLCP, endorses the coming together of all Life Care Planners to address issues that impact the field. This opportunity affords Life Care Planners a voice in the future direction of Life Care Planning

Sincerely,

AANLCP Board

*498 East Golden Pheasant Drive*

*Draper, Utah 84020*

*Phone (801) 816-0908*

*888-575-4047*

*Fax (801) 553-9931*

---

---

## IALCP

---

International Academy of Life Care Planners  
114 N. W. Fifth Street, Suite 103, Ankeny, Iowa 50021

Tel: 800.531.5146  
Fax: 515.965.1286  
Email: [IALCP@aol.com](mailto:IALCP@aol.com)

January 29, 2003

Susan Riddick-Grisham  
Life Care Manager, L.L.C.  
3126 West Cary Street, #137  
Richmond, Virginia 23221

Dear Susan:

I have reviewed your summarization of the outcomes of the Life Care Planning Summit 2002. The responses from participants demonstrate a unified desire to promote quality life care planning practice through education, standards and communication. The International Academy of Life Care Planners endorses the results of the Summit 2002. Thank you for your diligent work on this project.

Sincerely,



Patricia McCollom, MS, RN, CRRN, CDSM, CCM, CLCP  
CEO

PM:sm

cc: Ann Neulicht

---

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

<p><b>Albee, Tracy</b>            RN, PHN, LNC, CLCP            MediLegal            1852 W. 11th St. Suite 333            Tracy, CA 95376            Co. Phone: (209) 833-7251            Co. FAX: (209) 832-3189            Home Phone:            Home FAX:            Pager:            Email: albee@inreach.com</p>	<p><b>Allison, Lori</b>            BA, MA            Paul M. Deutsch &amp; Associates            1750 W. Broadway #106            Oviedo, FL 32765            Co. Phone: 4079773223            Co. FAX:            Home Phone: 4968869714            Home FAX:            Pager:            Email: kiruakkusib/2nac,cin</p>	<p><b>Apuna, Dorajane</b>            RN, CNLCP, CCM            Medical Legal Case Strategies            5035 Date Avenue            Sacramento, CA 95841            Co. Phone: 9163444844            Co. FAX: 9163444346            Home Phone:            Home FAX:            Pager:            Email: casestrategies@attbi.com</p>
<p><b>Armstrong, Barbara</b>            RN, CDMS, CCM, CLCP            Armstrong &amp; Associates            P.O. Box 470637            Charlotte, NC 28247            Co. Phone: (800) 277-1111            Co. FAX: (704) 543-8224            Home Phone: (704) 843-0369            Home FAX:            Pager:            Email: barmstrong@msn.com</p>	<p><b>Arnold, Terry</b>            RN, CRRN, CDMS, CCM, CLCP            Life Care Consultants, Inc.            7826 Trent Way            Houston, TX 77040            Co. Phone: 7139830121            Co. FAX: 7139830198            Home Phone:            Home FAX:            Pager:            Email: tka_lcc@yahoo.com</p>	<p><b>Bagwell, Dan</b>            RN, CDMS, CCM, CLCP            Rehabilitation Professional Consultants, Inc./            2829 Babcock Road Suite 130            San Antonio, TX 78229            Co. Phone: (210) 615-7772            Co. FAX: (210) 615-7728            Home Phone: (210) 698-8305            Home FAX: (210) 698-8309            Pager:            Email: Dbagwell@swbell.net</p>
<p><b>Barker, Ellen</b>            MSN, RN, CRRN, CLCP            Neuroscience Nursing Consultants            3600 Centerville Rd.            Greenville, DE 19807            Co. Phone: (302) 888-1468            Co. FAX: (302) 888-1461            Home Phone:            Home FAX:            Pager:            Email: ebarker@bellatlantic.net</p>	<p><b>Bellerive, Becky</b>            RN, CDMS, CCM, CLCP            Medical Management &amp; Rehab            PO Box 1294            Puyallup, WA 98372            Co. Phone: (253) 770-1281            Co. FAX: (253) 770-9820            Home Phone:            Home FAX:            Pager:            Email: bbellerive@aol.com</p>	<p><b>Berens, Debbie</b>            MS, CRC, CCM, CLCP            Weed &amp; Associates            1156 Masters Lane            Snellville, GA 30078            Co. Phone: (770) 978-9212            Co. FAX: (770) 972-6112            Home Phone: (770) 985-4546            Home FAX:            Pager:            Email: dberens@attbi.com</p>
<p><b>Blackwelder, Terri</b>            RN, CRRN, CCM, BSN, CLCP            Blackwelder Medical, L.L.C.            201 Bienville Road            Folsom, LA 70437            Co. Phone: 9857965892            Co. FAX: 9857963634            Home Phone:            Home FAX:            Pager:            Email: terri@blackweldermedical.com</p>	<p><b>Bopp, Jack</b>            CRC, CCM            Rehabilitation Services Associates            PO Box 628/24 Main Street            Henniker, NH 03242            Co. Phone: (603) 428-7383            Co. FAX: (603) 428-3689            Home Phone:            Home FAX:            Pager:            Email: rsa@conknet.com</p>	<p><b>Casuto, Doreen</b>            RN, MRA, CRRN, CCM, CLCP            Rehabilitation Care Coordination            7851 Mission Center Court Suite 103            San Diego, CA 92108            330-78-4223            Co. Phone: (619) 299-9922            Co. FAX: (619) 299-9932            Home Phone: (619) 453-3042            Home FAX:            Pager:            Email: RehabCareCoord@worldnet.att.net</p>

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

<p><b>Costantini, Patricia</b>  RN, M.Ed., CRC, CCM, CLCP, LNCC  Costantini Rehab Inc  P.O. Box 97105  Pittsburgh, PA 15229-0105  Co. Phone: (412) 939-3424  Co. FAX: (412) 939-3427  Home Phone:  Home FAX:  Pager:  Email: patty4303@aol.com</p>	<p><b>Craig, Cynthia</b>  RN, RNP, CDMS, CCM  VEP Enterprises Inc.  P.O. Box 12387  Pensacola, FL 32582  Co. Phone: 8504336886  Co. FAX: 8504336551  Home Phone: 8504582731  Home FAX:  Pager:  Email: cynthia.craig@kmcmail.net</p>	<p><b>Crockett, Karon H</b>  CDMS, RN, CRRN, CCM, CLCP  Case Management Inc.  2870 Old Rocky Ridge Rd Suite #120  Birmingham, AL 35216  Co. Phone: (800) 729-2164  Co. FAX: (205) 823-0936  Home Phone:  Home FAX:  Pager:  Email: Kcrockett@case-management.com</p>
<p><b>Davis, Elizabeth</b>  MS, RN, CRRN, CLCP  Life Care Resources, Inc.  PO Box 754  Cedar Bluff, VA 24609  Co. Phone: 5409632253  Co. FAX: 5409638336  Home Phone: 5409636625  Home FAX: (540) 963-2253  Pager:  Email: edbelcher@naxs.net</p>	<p><b>Davis, Estelle L</b>  CRC, CDMS  Bussey, Davis &amp; Associates Inc.  9500 Annapolis Road Suite B-6  Lanham, MD 20706  Co. Phone: 301-459-0700  Co. FAX: 301-459-3457  Home Phone:  Home FAX:  Pager:  Email: BDA2@errols.com</p>	<p><b>Deming, Laura</b>  RN, MSN, BSN, RNC, CCM, CLCP  Olsten Health Services  3115 Orchard Valley Court  Houston, TX 77084  Co. Phone: 7137045057  Co. FAX: (281) 578-9486  Home Phone: (281) 578-9475  Home FAX:  Pager:  Email: laura123@pdq.net</p>
<p><b>Deutsch, Paul M</b>  Ph.D., CRC, CDMS, CCM LMHC, CLCP, FIALCP  Paul M. Deutsch &amp; Associates  P O Box 622049  Oviedo, FL 32762-2049  Co. Phone: (407) 977-3223  Co. FAX: (407) 977-0311  Home Phone: 4073492522  Home FAX:  Pager:  Email: PDeut18893@mac.com</p>	<p><b>Dierking, Linda G</b>  RN, CRRN, CCM, CLCP  Catastrophic Consultants  4334 Foeburn Lane  Louisville, KY 40207  Co. Phone: (502) 896-0803  Co. FAX: (502) 896-0801  Home Phone: (502) 895-6847  Home FAX:  Pager:  Email: lgdierk@bellsouth.net</p>	<p><b>Driver, Orillia</b>  RN, BSN, CDMS, CCM, CLCP  RSKCO  3175 Satellite Boulevard Bldg #600-Suite #500  Duluth, GA 30096  Co. Phone: 6784733615  Co. FAX: 6784733579  Home Phone:  Home FAX:  Pager:  Email: orillia.driver@rskco.com</p>
<p><b>Eklund, Wayne</b>  RN  9285 Alaska St. SE  Salem, OR 97301  Co. Phone: (503) 363-7096  Co. FAX: (815) 327-5327  Home Phone: (503) 589-1581  Home FAX:  Pager:  Email: wayne@wayneeklund.com</p>	<p><b>Esko, Lynn</b>  CRC, LMHC, CCM, CLCP  Esko Counseling  978 Douglas Avenue Ste. 104  Altamonte Springs, FL 32714  Co. Phone: (407) 788-8813  Co. FAX: (407) 788-9338  Home Phone:  Home FAX:  Pager:  Email: lynnesko@aol.com</p>	<p><b>Farnsworth, Kristy</b>  CRC, CDMS, CVE, PhD.  Farnsworth &amp; Associates  955 South 700 East Suite #100  Sandy, UT 84070  Co. Phone: 8015725633  Co. FAX: 8015459422  Home Phone:  Home FAX:  Pager:  Email: kfar@xmission.com</p>

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

**Fawber, Heidi**  
 M.Ed., CRC, CCM, CLCP  
 100 Brookshire Drive  
 Mars, PA 16046  
 206-38-8066  
 Co. Phone: 7247767900  
 Co. FAX: (724) 779-1969  
 Home Phone: 7247791965  
 Home FAX:  
 Pager:  
 Email: heidifawber@hotmail.com

**Ficklin, Sherry**  
 RN, CRRN, CCM, CRC, CVE, CDMS, CNLCP  
 R.N.S. Inc  
 Po Box 23144  
 Oklahoma City, OK 73123  
 Co. Phone: 4057214625  
 Co. FAX: 4057210548  
 Home Phone: 4052029078  
 Home FAX:  
 Pager:  
 Email: rnssf@cox.net

**Field, Timothy**  
 Ph.D.  
 Elliott & Fitzpatrick  
 PO Box 1945  
 Athens, GA 30603-1945  
 Co. Phone: 706-548-8161  
 Co. FAX: 706-546-8417  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: tfield@athenssprinting.com

**Gartman, Linda**  
 RN, CRRN, CLCP, CCM, LNC-C  
 Gartman Health & Rehabilitation  
 PO Box 209  
 Avon, OH 44011  
 Co. Phone: (440) 937-9474  
 Co. FAX: (440) 937-9473  
 Home Phone: (440) 937-9474  
 Home FAX:  
 Pager:  
 Email: Nickirn@aol.com

**Giannelli, Paul**  
 Case Western Reserve Law School  
 11075 East Boulevard  
 Cleveland, OH 44106  
 Co. Phone: 2163682098  
 Co. FAX:  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: pcg@po.cwru.edu

**Gill, Joyce**  
 M.Ed., CRC, CDMS, CCM, CLCP  
 J.B. Gill & Associates  
 4540 Kearny Villa Road 109  
 San Diego, CA 92123  
 Co. Phone: (858) 467-6800  
 Co. FAX: (619) 467-6805  
 Home Phone: 7607535320  
 Home FAX:  
 Pager:  
 Email: jgillrehab@aol.com

**Giuseffi, Claire**  
 RN, CDMS, CCM, CLCP  
 Claire Giuseffi & Associates  
 1208 North Lakewood Avenue  
 Ocoee, FL 34761  
 Co. Phone: 4076564877  
 Co. FAX: 4076545367  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: cgafia@att.net

**Glidden, Mary**  
 RN, BSN, CCM, CLCP, D-ABDA, CRRN  
 Med Rehab Consultants Inc.  
 111 West Cataldo Ste. 200  
 Spokane, WA 99201  
 Co. Phone: (800) 827-5058  
 Co. FAX: (509) 328-9777  
 Home Phone: (509) 255-5347  
 Home FAX:  
 Pager:  
 Email: gliddenm@medrehabconsultants.com

**Goodrich, William R**  
 MA, CRC, NCC, ABVE, CCM, CLCP  
 National Life Care Institute  
 PO Box 8839  
 Missoula, MT 59807  
 539-42-9858  
 Co. Phone: 4065421511  
 Co. FAX: (406) 549-5305  
 Home Phone: (406) 721-0135  
 Home FAX:  
 Pager:  
 Email: billg@nlcii.com

**Grisham, Susan R**  
 RN, CCM, CLCP  
 Life Care Manager, LLC  
 3126 West Cary Street #137  
 Richmond, VA 23221  
 Co. Phone: 8002521094  
 Co. FAX: 8045596522  
 Home Phone: 8045596521  
 Home FAX: 8045596522  
 Pager:  
 Email: sgrisham@attbi.com

**Guse Salah, Judy**  
 RN  
 St. Clair Kids  
 193 Delorain Avenue  
 Toronto, CN M5M2B1  
 Co. Phone: 4164863806  
 Co. FAX: 4164882191  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: jguse@rodgers.com

**Hanigosky, Pamela D**  
 RN, BSN, CRRN, CCM, CLCP  
 Recovery Options Management Inc.  
 8941 Edgewood Drive  
 N. Royalton, OH 44133  
 Co. Phone: 800508291477  
 Co. FAX: (440) 237-4840  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: phrncmlcp@aol.com

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

<p><b>Haseley, Cynthia Ann</b>            CCM, RN, CLCP            Matrix Rehab Consultants            3100 South Sheridan Boulevard #1C-506            Denver, CO 80227            Co. Phone: (303) 734-0293            Co. FAX: (303) 795-1456            Home Phone:            Home FAX:            Pager:            Email: c.haseley@attbi.com</p>	<p><b>Hecker, Benson</b>            PhD, CVE, CLCP            Rehabilitation Associates            506 Pettigru Street            Greenville, SC 29601            Co. Phone: (864) 242-1142            Co. FAX: (864) 232-4195            Home Phone:            Home FAX:            Pager:            Email: bhecker@carol.net</p>	<p><b>Hedrick, Patricia K</b>            RN, BSN, CRRN, CCM, CPDM, CLCP            Hedrick &amp; Associates            531 Main Street, #1166            El Segundo, CA 90245-0379            Co. Phone: 3103356005            Co. FAX: 3106150379            Home Phone: 3103228116            Home FAX: (310) 615-0379            Pager: 3109627502            Email: pkhedrick@bigplanet.com</p>
<p><b>Hicks, Patricia B</b>            RN, BSN, CRRN, CCM, CLCP            Patricia B. Hicks Associates            628 Blue Ash Drive            Lexington, KY 40503            Co. Phone: 8592760887            Co. FAX: 8592763316            Home Phone: 8592237706            Home FAX:            Pager:            Email: PbHicks@aol.com</p>	<p><b>Hinton, Lori</b>            Dr.Ph., RN, BSN, CLCP            American Case Management            1330 Post Oak Boulevard #2900            Houston, TX 77056            Co. Phone: (713) 621-4240            Co. FAX: (713) 621-1490            Home Phone:            Home FAX:            Pager:            Email: lhinton@hintonlaw.com</p>	<p><b>Holakiewicz, Liz</b>            RN, CCM, CNLCP            7720 B El Camino Real #187            Carlsbad, CA 92009            Co. Phone: (760) 632-7447            Co. FAX: (760) 632-7420            Home Phone: (760) 632-7447            Home FAX:            Pager:            Email: lizhrn@pacbell.net</p>
<p><b>Hyland, Carol</b>            CDMS, CLCP            4120 Canyon Road            Lafayette, CA 94549            Co. Phone: 9252836782            Co. FAX: (925) 283-5322            Home Phone:            Home FAX:            Pager:            Email: crhyland@aol.com</p>	<p><b>Keckley, Paul H</b>            Ph.D.            EBM Solutions, Inc.            3401 West End Avenue Suite #510            Nashville, TN 37203-6893            Co. Phone: 6152501650            Co. FAX: 6152501693            Home Phone:            Home FAX:            Pager:            Email: keckley@EBMSolutions.com</p>	<p><b>Kelsay, Margaret</b>            LPC, CRC, CCM, CDMS, NCC            Rehabilitation Services Association, Inc.            2809 NW Expressway Ste. 212            Oklahoma City, OK 73112            Co. Phone: (405) 842-9531            Co. FAX: (405) 840-1749            Home Phone: 4057893253            Home FAX:            Pager:            Email: MKelsay661@aol.com</p>
<p><b>Kendall, Sherie L</b>            University of Kentucky College of Medicine            Anatomy &amp; Neurobiology MN-224 Chandler Med            Lexington, KY 40536-0298            Co. Phone: 8593236137            Co. FAX: 8593235946            Home Phone:            Home FAX:            Pager:            Email: skend2@uky.edu</p>	<p><b>Kitchen, Julie</b>            BSN, CDMS, CLCP            Paul M. Deutsch &amp; Associates            5020 Cub Lake Drive            Apopka, FL 32703            Co. Phone: (407) 977-3223            Co. FAX: (407) 977-0311            Home Phone: 4072905642            Home FAX: (407) 290-2421            Pager:            Email: jkitchen@cfl.rr.com; Juliek205@aol.com</p>	<p><b>Klein, Diana</b>            RN, BSN, MS, CLCP            Klein Rehabilitation            PO Box 431            Cooperstown, PA 16317            Co. Phone: (814) 789-3865            Co. FAX: (814) 789-3875            Home Phone: 8147892008            Home FAX:            Pager:            Email: dklein@toolcity.net</p>

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

<p><b>Knouse, Judy</b>            MSN, CRRN            Knouse Consulting            553 Shoshone Street            Grand Junction, CO 81504            Co. Phone: 9705234351            Co. FAX: 9705234359            Home Phone: 9705234351            Home FAX:            Pager:            Email: JLKnouse@sprynet.com</p>	<p><b>LaClair, Norma</b>            Ph.D., RN, LPC            The LaClair Company            25 Pleasant View Drive            Gray, ME 04039            Co. Phone: 2074283055            Co. FAX: 2074283053            Home Phone:            Home FAX:            Pager:            Email: Norma@LeclairCompany.com</p>	<p><b>LaGasse, Nancy</b>            RN, MS, CDMS, CCM, CLCP, LHRM, ARM            Southern Catastrophic Management Services            4820 Sawyer Road            Sarasota, FL 34233-2140            Co. Phone: 8779238882            Co. FAX:            Home Phone: (941) 922-5226            Home FAX: (941) 922-5091            Pager:            Email: scmsnl@comcast.net</p>
<p><b>Lance, Kelly</b>            RN, BSN            Kelync            498 E. Golden Pheasant Drive            Draper, UT 84020            Co. Phone: (801) 572-4047            Co. FAX: (801) 553-9931            Home Phone: (801) 495-0153            Home FAX:            Pager:            Email:</p>	<p><b>Landy, Janice</b>            RN, CRRN, ARW            10380 Southgate Road            Richmond, BC, CN V7A 2X6            Co. Phone: 6042742221            Co. FAX: 6042742410            Home Phone: (604) 274-2221            Home FAX:            Pager:            Email: JKLandy@yahoo.ca</p>	<p><b>Lessne, Robert L.</b>            10765 SW 104th Street            Miami, FL 33176            Co. Phone: 3052710011            Co. FAX: 3052731221            Home Phone: 3052710011            Home FAX:            Pager:            Email: ergobob@consultant.com</p>
<p><b>Lester, Robert</b>            CRC, MBA, CLCP            Capital Case Management            PO Box 2920            Stafford, VA 22554            Co. Phone: 5407201024            Co. FAX: 5407208833            Home Phone: 7035514123            Home FAX:            Pager:            Email:</p>	<p><b>Little, Dasha</b>            MS, CDMS, CRC, CLCP, CCM            Aspen Counseling Inc.            PO Box 65301            Virginia Beach, VA 23467            Co. Phone: (757) 549-2645            Co. FAX: (757) 549-9939            Home Phone: (757) 549-9939            Home FAX:            Pager:            Email: aspencouns@aol.com</p>	<p><b>Lopez, Viola G</b>            CDMS, CRC, CCM, LPC, CLCP            Lopez-Kramberg, Inc.            4606 Morningside Drive            Houston, TX 77005            Co. Phone: (713) 526-7215            Co. FAX: (713) 526-0067            Home Phone:            Home FAX:            Pager:            Email: violalo@aol.com</p>
<p><b>Lovegrove, Ann</b>            RN, CDMS, CCM, CLCP            Life Care Resources            5379 Mariner's Cove Drive #510            Madison, WI 53704            Co. Phone: 6082400785            Co. FAX: 6082400786            Home Phone: 6082400777            Home FAX:            Pager:            Email: Lovezur@aol.com</p>	<p><b>Lovell, Leslie</b>            RN, CDMS, CCM            Superior Rehabilitation Services            22 Elder Drive            Marquette, MI 49855            Co. Phone: 9062288382            Co. FAX:            Home Phone:            Home FAX:            Pager:            Email: lovell@aol.com</p>	<p><b>Maniha, Ann</b>            RN, CLCP            United Case Management Services            817 W. 30th Street            Houston, TX 77018            Co. Phone: 7138617633            Co. FAX: (713) 861-3255            Home Phone:            Home FAX:            Pager:            Email: amaniha@houston.rr.com</p>

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

**Marshall-Gilfillan, Terri**  
 CRC, CDMS, CCM, CLCP  
 MGD Management  
 9167 S. Falcon Circle  
 Sandy, UT 84093  
 Co. Phone: (801) 944-5763  
 Co. FAX: (801) 944-2349  
 Home Phone: 8019442311  
 Home FAX:  
 Pager:  
 Email: mtgil@aol.com

**May, III, V.Robert**  
 Comm. on Disability Examiner Certification  
 13325 Queensgate Road  
 Midlothian, VA 23114  
 Co. Phone: (804) 272-9192  
 Co. FAX: (804) 272-9257  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: mayrehab@att.net

**McCollom, Patricia**  
 MS,RN, CRRN,CDMS, CCM, CLCP  
 International Academy of Life Care Planners  
 114 North West 5th Street  
 Ankeny, IA 50021  
 Co. Phone: (800) 531-5146  
 Co. FAX: (515) 965-1286  
 Home Phone: 5152767312  
 Home FAX:  
 Pager:  
 Email: ialcp@aol.com

**McDaniel, Jo Anne**  
 RN, CCM, CLCP  
 Life Care Planning Consultants, Inc.  
 12 San Isidro  
 Pevely, MO 63070  
 Co. Phone: 6364754800  
 Co. FAX: 6364754801  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: jonurse@aol.com

**Meier, Robert**  
 MD  
 Spectrum Outpatient Rehabilitation  
 8515 Pearl Street Suite #300  
 Thornton, CO 80229  
 Co. Phone: 3032868692  
 Co. FAX: 3032868716  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: SkipDoc@ix.netcom.com

**Micklow, Donna**  
 RN, CRRN, BSN, CLCP  
 Brubaker Rehab Management  
 37 McMurray Road Suite 2101  
 Pittsburgh, PA 15241  
 Co. Phone: (412) 242-7211  
 Co. FAX: (412) 242-7321  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: brurehab@aol.com

**Mitchell, Nancy**  
 OTR/L, CLCP  
 Mitchell Disability Assessments & Life Care  
 4574 137th Street, W.  
 Apple Valley, MN 55124  
 Co. Phone: 9524235766  
 Co. FAX:  
 Home Phone: 9523221475  
 Home FAX: 6512293911  
 Pager:  
 Email: careplan@hotmail.com

**Morris, Elisa**  
 RN, CRRN, CCM, CLCP  
 Consulting & Life Care Planning, Inc  
 P.O.Box 6388  
 Vero Beach, FL 32961  
 Co. Phone: (561) 569-9170  
 Co. FAX: (561) 569-1382  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: elisarn@bellsouth.net

**Neulicht, Ann T**  
 Ph.D., CRC, CDMS, CVE, LPC, CLCP, ABVE  
 Ann T. Neulicht, Ph.D.  
 PO Box 98914  
 Raleigh, NC 27624  
 Co. Phone: (919) 870-6048  
 Co. FAX: (919) 870-6048  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: aneulicht@pass.net

**Nixon, Janice**  
 RN, CDMS, CRC, CCM, LRC, CLCP  
 Spectrum Services  
 45 Main Street  
 Lakeville, MA 02347  
 Co. Phone: (508) 946-4554  
 Co. FAX: (508) 946-8930  
 Home Phone: (508) 224-7062  
 Home FAX:  
 Pager:  
 Email: janicenixon@aol.com

**Noe, Alice**  
 RN, CCM, CLCP  
 Care Managers Inc.  
 13175 Schavey Road  
 DeWitt, MI 48820  
 Co. Phone: (517) 669-7400  
 Co. FAX: (517) 669-0042  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: caremaninc@aol.com

**Nusbaum, Nancy**  
 RN, MSN, CRRN, BSN, CCM, CLCP, FNP  
 Comprehensive Care Systems  
 2320 Quincy Drive  
 Bakersfield, CA 93306  
 Co. Phone: 6613357700  
 Co. FAX: (661) 335-7709  
 Home Phone:  
 Home FAX:  
 Pager: (661) 328-2138  
 Email: compcare@ncinternet.net

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

**Orstein, Barbara**  
 M.Ed., CRC, CCM  
 Orstein Disability Consultants  
 4307-A Derry Street  
 Harrisburg, PA 17111  
 Co. Phone: 7175580500  
 Co. FAX: 7175589255  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: orstein@hotmail.com

**Ostrowski, Carole**  
 RN, CCM  
 Ostrowski & Associates  
 218 Fair Meadow Circle  
 Houston, PA 15342-1076  
 Co. Phone: (724) 746-2359  
 Co. FAX: (724) 746-8815  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email:

**Ostrowski, Lawrence**  
 PhD,BA,MA,CCM, CRC, CLCP  
 Ostrowski & Associates  
 218 Fair Meadow Circle  
 Houston, PA 15342-1076  
 Co. Phone: (724) 746-2359  
 Co. FAX: (724) 746-8815  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: lostrow218@aol.com

**Penilton, Dana**  
 RN, BSN, CCM  
 Dana Penilton Consulting, Inc.  
  
 Co. Phone: (503) 246-6232  
 Co. FAX: (503) 244-1650  
 Home Phone: 5032443118  
 Home FAX: (503) 244-1650  
 Pager:  
 Email: danapen@attbi.com

**Postenrieder, Lauri**  
 RN, BSN, CCM, CLCP  
 Professional Medical Consultants, PC  
 PO Box 35911  
 Albuquerque, NM 87176  
 Co. Phone: (505) 262-9134  
 Co. FAX: 5052620469  
 Home Phone: (505) 262-9133  
 Home FAX:  
 Pager: 5055309011  
 Email: laurip1@aol.com

**Pouch, Kathy**  
 RN, CNLCP, CCM  
 Care Managers, Inc.  
 13175 Schavey Road  
 DeWitt, MI 48820  
 Co. Phone: 9896697400  
 Co. FAX: 9892270033  
 Home Phone: 9892248520  
 Home FAX:  
 Pager:  
 Email: kattay@voyager.net

**Preston, Karen**  
 MS, RN, CRRN, PHN, CCM, CLCP  
 RNS Healthcare Consultants  
 4811 Chippendale Drive Ste 704  
 Sacramento, CA 95841  
 Co. Phone: (916) 929-6506  
 Co. FAX: (916) 929-6013  
 Home Phone: (916) 979-9819  
 Home FAX:  
 Pager:  
 Email: RNSpreston@aol.com

**Provenzano, Fran**  
 RN, BSN, CDMS, CCM, CLCP  
 IntraCorp  
 431 Shore Drive, East  
 Oldsmar, FL 34877  
 Co. Phone: (813) 854-1800  
 Co. FAX: (813) 854-1800  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: Jprogorator@aol.com

**Readie, Bonita**  
 RN, CLCP, LNCC, CCM  
 Occupational Resource Specialists  
 707 Idlewood Ave.  
 Pittsburgh, PA 15106  
 Co. Phone: 4122760509244  
 Co. FAX: (412) 276-1108  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email:

**Reid, Christine**  
 Ph.D., CRC, CVE, CCM, NCC, DABFE, DABPS,  
 Virginia Commonwealth University  
 Rehabilitation Counseling Dept. POB 980330  
 Richmond, VA 23298  
 Co. Phone: (804) 827-0915  
 Co. FAX: (804) 828-1321  
 Home Phone: (804) 648-7869  
 Home FAX: 2155130701  
 Pager:  
 Email: creid@hsc.vcu.edu

**Rice, James M**  
 Ph.D., CRC, CLCP  
 Medical Psychology Associates, PC  
 9780 North Lantern Road Suite #210  
 Fishers, IN 46038  
 Co. Phone: (317) 578-4213  
 Co. FAX: (317) 578-9511  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: jricempa@iquest.net

**Rohrig, Mary Ann**  
 RN, CDMS, CCM, CRRN, CLCP  
 Rohrig and Associates  
 P O Box 9628  
 Canton, OH 44711  
 Co. Phone: (330) 455-0932  
 Co. FAX: (330) 455-0934  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: marohrig@cannet.com

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

**Rosenblatt, Cy**

Metro Health America Inc.  
 2635 Ridgewood Road Suite "A"  
 Jackson, MS 39216  
 Co. Phone: 6013629900  
 Co. FAX:  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: crosenblat@aol.com

**Sampeck, Kathleen**

CRC, CCM, CPC, CLCP  
 Capital Case Management  
 PO Box 2920  
 Stafford, VA 22555-2920  
 Co. Phone: (703) 551-4123  
 Co. FAX: 540-720-8833  
 Home Phone:  
 Home FAX: (540) 720-8833  
 Pager:  
 Email: ksampeck@aol.com

**Scheffel, Barbara**

RN, BS, CRRN, CCM, CDMS  
 Scheffel Associates Inc.  
 202 US Highway 1 Suite #351  
 Falmouth, ME 04105  
 Co. Phone: (908) 218-9480  
 Co. FAX: (908) 685-2010  
 Home Phone: 2078785492  
 Home FAX:  
 Pager:  
 Email: SAICareMg2@aol.com

**Schultheis, Karen**

CRC, CDMS, CCM, CLCP  
 Superior Rehab Services Inc.  
 PO Box 367  
 Iron Mountain, MI 49801  
 Co. Phone: (906) 774-9067  
 Co. FAX: (906) 774-4894  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: schulthk@up.lib.mi.us

**Schumacher, Leslie**

RN, CRRN, CCM, CLCP  
 Kemper National Services  
 2 Arrow Wood Mews  
 Medford, NJ 08055  
 Co. Phone: 6099532407  
 Co. FAX: 6099532430  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: Lschumac@Kemperinsurance.com

**Sells, Greg**

Sells & Associates Inc.  
 765 University Avenue #100  
 Sacto, CA 95825  
 Co. Phone: 9169250252  
 Co. FAX: 9169251913  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email:

**Sells, Tim**

MA, CRC  
 Sells & Associates, Inc.  
 765 University Ave #100  
 Sacramento, CA 95825  
 Co. Phone: 9169250252  
 Co. FAX: 9169251913  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: Tsells@aol.com

**Sereda, Susan**

CCRC, CLCP  
 SEREDA Rehabilitation Consulting, Ltd.  
 Box 389  
 Daysland, Alberta, CN T0B1A0  
 Co. Phone: (780) 374-2401  
 Co. FAX: (780) 374-3991  
 Home Phone: (403) 672-4015  
 Home FAX:  
 Pager:  
 Email: smssereda@telusplanet.net

**Shaw, Linda**

PhD, CRC  
 UF-HSC Dept. of Rehabilitation  
 Box 100175  
 Gainesville, FL 32610  
 Co. Phone: 3522650745  
 Co. FAX: 3522650744  
 Home Phone: (352) 375-6051  
 Home FAX:  
 Pager:  
 Email: lshaw@hp.ufl.edu

**Shea, Linda**

RN, BA, CRRN, CLCP  
 Harper, Inc.  
 1614 E. 27th Avenue  
 Spokane, WA 99203  
 Co. Phone: (509) 455-6387  
 Co. FAX: (509) 455-6876  
 Home Phone: (509) 455-6387  
 Home FAX:  
 Pager:  
 Email: lshea@grntech.net

**Shedlin, Steven**

M. Ed, CRC, CLCP  
 Rehabilitation Experts of Maryland, Inc.  
 11160 Veirs Mill Road Suite# 708  
 Silver Spring, MD 20902  
 Co. Phone: (301) 962-6800  
 Co. FAX: 3019629020  
 Home Phone: (301) 984-0357  
 Home FAX:  
 Pager:  
 Email: SShedlin@aol.com

**Sims, Susan**

RN, CRRN, CCM, CLCP  
 Blue Ridge Case Management  
 120 Atwood Drive  
 Hendersonville, NC 28792  
 Co. Phone: 8286982488  
 Co. FAX: 8286980976  
 Home Phone: 8286921056  
 Home FAX:  
 Pager:  
 Email: 1brcm@mchsi.com

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

**Smith, Myron A**

MS, CAGS, CRC, CLCP, ABVE  
 Independent Rehabilitation Resources  
 RR. 1 Box 730  
 Lincoln, VT 05443  
 Co. Phone: (802) 453-4514  
 Co. FAX: (802) 453-5135  
 Home Phone: 8024533575  
 Home FAX:  
 Pager:  
 Email: msmithcrrc@madriver.com

**St. Clair, Dawn P**

RN, CRRN, CDMS, CCM  
 Kemper National Services  
 1823 Flora Lane  
 Clearwater, FL 33755  
 Co. Phone: 7274422918  
 Co. FAX: 7274422855  
 Home Phone: (727) 576-3179  
 Home FAX:  
 Pager:  
 Email: dstclair@kemperinsurance.com

**St. Clair, Teresa**

CRC, ARW  
 St. Clair Rehabilitation  
 193 Deloraine Ave.  
 Toronto, Ontario, CN M5M2B1  
 Co. Phone: 4164863806  
 Co. FAX: 4164882191  
 Home Phone: 4164802449  
 Home FAX: 4164882191  
 Pager:  
 Email: kipper@interlog.com

**Stanislaw, Earlene**

RN, CCM, LNCC, DABFN, CASA  
 Medical Management Concepts, Inc.  
 P.O. Box 411331  
 St. Louis, MO 63141  
 Co. Phone: (314) 692-9800  
 Co. FAX: (314) 692-2751  
 Home Phone:  
 Home FAX:  
 Pager: 3144091554  
 Email: estanislaw@accessus.net

**Stegent, Ginny**

RN, CRRN, CDMS, CCM, CLCP  
 Med-Legal Services Inc.  
 506-1/2 Heights Blvd  
 Houston, TX 77007  
 Co. Phone: (713) 726-1221  
 Co. FAX: (713) 726-0100  
 Home Phone: (713) 463-0007  
 Home FAX:  
 Pager:  
 Email: gstegent@medlegalservices.com

**Stempel, Linda**

RN, CRRN, BS, CDMS, CCM, CLCP  
 Advanced Health Services  
 5405 Alton Pkwy 5A-450  
 Irvine, CA 92604  
 Co. Phone: (949) 559-9531  
 Co. FAX: (949) 559-6315  
 Home Phone:  
 Home FAX:  
 Pager: 9497171447  
 Email: linda.stempel@gte.net

**Sutton, Amy**

RN, BSN, MA  
 5222 Clearwater Drive  
 Stone Mountain, GA 30087  
 Co. Phone: 4042760154  
 Co. FAX:  
 Home Phone: 7708790196  
 Home FAX:  
 Pager:  
 Email: suttonav@yahoo.com

**Szeg, Charles**

M.Ed., CRC, CDMS, CCM, CLCP, LPC  
 Rehab Professionals  
 100 Elgins Court  
 Evans City, PA 16033  
 Co. Phone: (412) 486-5797  
 Co. FAX: (412) 487-2786  
 Home Phone: (724) 538-5800  
 Home FAX: (724) 538-4488  
 Pager:  
 Email: LIFECARE@ZBZOOM.NET

**Szeg, Judith**

RN, CDMS, CCM, CLCP  
 Rehab Professionals  
 100 Elgins Court  
 Evans City, PA 16033  
 Co. Phone: (412) 486-5797  
 Co. FAX: (412) 487-2786  
 Home Phone: (724) 538-5800  
 Home FAX: (724) 538-4488  
 Pager:  
 Email: LIFECARE@ZBZOOM.NET

**Taylor, Robert H**

MA, CRC, CDMS, CPC, CLCP  
 Vocational Diagnostics Inc.  
 1987 Haven's End  
 Prescott, AZ 86305-2148  
 Co. Phone: 9285419248  
 Co. FAX: 9287712860  
 Home Phone: 9287787602  
 Home FAX:  
 Pager:  
 Email: mb280sl@cableone.net

**Thomas, Randall L**

Ph.D., CRC, NBCC, ABVE, CLCP  
 National Center for Life Care Planning  
 PO Box 2446  
 Madison, MS 39130  
 Co. Phone: (601) 956-3868  
 Co. FAX: (601) 952-0072  
 Home Phone: (601) 956-3868  
 Home FAX: (601) 952-0072  
 Pager:  
 Email: LCPSTAT595@aol.com

**Tobie, Karen**

RN, CRRN, CCM, CLCP  
 Tobie & Associates Inc.  
 PO Box 4065  
 Federal Way, WA 98063-4065  
 Co. Phone: 2535295400  
 Co. FAX: 2535295402  
 Home Phone: (206) 246-5260  
 Home FAX:  
 Pager:  
 Email: ktobielcp@aol.com

**Participant List**  
**Oak Brook, IL**  
**LCP Summit 2002**  
**5/18/2002 - 5/19/2002**

**Toyne, Gini Lee**

RN, MBA, CDMS, CCM, CLCP  
 Gini L. Toyne & Associates, Inc.  
 8800 NW 112th Street Suite 320  
 Kansas City, MO 64153  
 Co. Phone: 8162431302  
 Co. FAX: 8162431307  
 Home Phone: 8003679369  
 Home FAX:  
 Pager:  
 Email: ginitoyne@gitoyne.com

**Van de Bittner, Eugene**

Ph.D., CRC, CLCP, ABVE  
 Mirfak Associates Inc.  
 201 Lafayette Circle Suite #100  
 Lafayette, CA 94549-4370  
 Co. Phone: (925) 283-4100  
 Co. FAX: (925) 283-9549  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: gene@mirfak.com

**Walker, Carol P**

Ph.D., CLCP  
 NeuroLife  
 3313 S. Memorial Parkway Suite #108  
 Huntsville, AL 35801  
 Co. Phone: (256) 535-2322  
 Co. FAX: (256) 535-2411  
 Home Phone: (256) 883-7847  
 Home FAX: (256) 883-9974  
 Pager:  
 Email: cwalker@hiwaay.net

**Weed, Roger**

Ph.D., CRC, CDMS, CCM, CLCP, FNRC, A  
 Georgia State University  
 3769 Paradise Pointe  
 Duluth, GA 30097  
 Co. Phone: (770) 476-0075  
 Co. FAX: (770) 476-0395  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email:

**Wells, Sandra**

LPC, Ed.D., CLCP  
 Sandra M. Wells, Ed.D., Inc.  
 722 Flower Drive  
 McGeheysville, VA 22840  
 Co. Phone: 5402893127  
 Co. FAX:  
 Home Phone: (804) 990-9111  
 Home FAX:  
 Pager:  
 Email: SandysWell@aol.com

**Wempen, Karen A**

BS, MS, CLCP  
 1002 South Poplar  
 Pana, IL 62557  
 Co. Phone: (217) 785-3882  
 Co. FAX: 2175240289  
 Home Phone: (217) 562-4922  
 Home FAX:  
 Pager:  
 Email: kwempen1@chipsnet.com

**Wiles-Higdon, Carolyn W**

Ph.D., CCC, SP, CLCP  
 Dept of Comm Disorders, U. of Mississippi  
 PO Box 915  
 Oxford, MS 38655  
 Co. Phone: 6629151202  
 Co. FAX: 4134312735  
 Home Phone: 7703931340  
 Home FAX:  
 Pager:  
 Email: carolynwhigdon@aol.com

**Williams, Peggy**

RN, CDMS, CCM, CLCP  
 Brubaker Rehab Management  
 37 McMurray Road Suite #2101  
 Pittsburgh, PA 15241  
 Co. Phone: (412) 242-7211  
 Co. FAX: 4128338020  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: brurehab@aol.com

**Winkler, Terry**

M.D., CLCP  
 Ozark Rehabilitation Center  
 3424 S. Culpepper Court  
 Springfield, MO 65804  
 Co. Phone: (417) 887-3293  
 Co. FAX: (417) 887-9830  
 Home Phone: (417) 452-3892  
 Home FAX:  
 Pager:  
 Email: twinkler@millertel.net

**Yudkoff, Mona**

RN, CRRN, CCM, CLCP  
 Mona Yudkoff Rehab Consultants  
 104 Birch Avenue  
 Bala Cynwyd, PA 19004  
 Co. Phone: (610) 664-8760  
 Co. FAX: (610) 664-2227  
 Home Phone:  
 Home FAX:  
 Pager:  
 Email: mona@yudkoffrehab.com

**Yuhus, Steven**

CRC, CCM, NCC, CLCP  
 The Directions Group  
 P.O.Box 1108  
 Mt. Pleasant, SC 29465  
 Co. Phone: (800) 242-8856  
 Co. FAX: 8438499991  
 Home Phone: 8438490400  
 Home FAX:  
 Pager:  
 Email: steveyuhus@thedirectionsgroup.com