

***PDC, Inc.***

***April 28 - 30, 2004***

***Sandestin Golf & Beach Resort***

***Destin, Florida***

**Executive Sponsors**



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***PDC 2004 DISABILITY EXPERTS FORUM  
SANDESTIN GOLF & BEACH RESORT  
APRIL 28 - 30, 2004***

## **Join Us**

Since 1990, PDC has maintained its focus on helping clients thoroughly, fairly, and objectively assess complex psychiatric and medical disability claims. PDC professionals include clinical and forensic psychologists, neuropsychologists, nurses, rehabilitation professionals, social workers, master level therapists, and disability claim specialists.

PDC offers customized services designed to enhance our clients' understanding of complex disability claims. Our network of Independent Medical Examination providers, Peer Review Experts and Functional Capacity Evaluation professionals assess the level of impairment and its impact on the claimant's capacity to work. The Specialized Psychiatric Assessment Network (SPAN<sup>SM</sup>) psychologists conduct face to face interviews and address clinical, motivational, situational, and occupational issues germane to a disability claim. SPAN consultants are located throughout the country. PDC also offers Training Programs and Claim Consultation services. Our staff and consultants can provide assistance either on-site or from our home office.

Recognizing the unique challenges that complex psychiatric and medical claims present to our clients, PDC is hosting its first two-day *Disability Experts Forum* designed to engage and energize attendees with dynamic and informative presentations and workshops, as well as interesting networking opportunities.

### ***Who should attend the Forum?***

- Disability Claims Professionals
- Medical Directors, Psychiatrists, Psychologists, Nurses, and other clinical professionals who assist in the assessment of disability claims
- Representatives from Insurers, Reinsurers, Third Party Administrators, Self-insuring companies, and other entities involved in disability claims management
- Attorneys who provide legal support to disability claim evaluators
- Professionals interested in enhancing their knowledge regarding the appropriate evaluation of psychiatric and complex medical disability claims



Our Keynote speaker is Chris Carr, Ph.D. Currently, Dr. Carr is the Sports Psychologist for the Methodist Sports Medicine Center in Indianapolis and the Sport/Performance Psychologist for the Kansas City Royals Baseball Club. He also consults with the Indianapolis Colts and the Indiana Fever (WNBA). He is the Consulting Sports Psychologist with Purdue University and Butler University athletic departments, and was the Psychologist for Athletics at The Ohio State University from 1995-2000. He is a consultant with the Player Development Staff of the National Football League (NFL) and was the team psychologist for the Arizona Cardinals (NFL) in 1994. Dr. Carr's other

accomplishments include his ongoing work with the United States Navy Officer Candidate School as well as with other Olympic, professional, and collegiate sports programs, including his role as the Sports Psychologist with the United States Men's Alpine Ski Team from 1992-2002.

**PDC 2004 DISABILITY EXPERTS FORUM**  
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**APRIL 28 - 30, 2004**

**Wednesday, April 28**

**4:00-8:00 p.m.**  
REGISTRATION

**6:30-8:00 p.m.**  
WELCOME RECEPTION  
Sponsored by Claims Bureau



**Thursday, April 29**

**7:30-8:30 a.m.**  
CONTINENTAL BREAKFAST & REGISTRATION  
Sponsored by **Patrick Goodrich**  
Investigations/Claim Services

**8:30-10:15 a.m.**  
WELCOMING REMARKS & KEYNOTE SPEAKER

***Psychological Health Issues and the World of Sports-  
The Differences between Professional Athletes and  
the Rest of the World. It's Not What You Think!***

**Chris Carr, Ph.D., HSPP**

Dr. Carr will offer his interesting perspective on professional athletes and impairment. Specifically, he will discuss how psychiatric symptoms frequently appear within the sports arena, what is done to address the difficulties facing athletes, and the techniques used to support athletes in their quest for success. Dr. Carr will review the ongoing, although diminishing, stigma associated with mental illness and professional sports. Based on his years of experience providing counseling to elite athletes, Dr. Carr will discuss how these mental health issues have a dynamic and unique impact within the culture of sports, yet surprisingly are not very different from the rest of the world.

**10:15-10:45 a.m.**  
REFRESHMENT BREAK  
Sponsored by CS Claims



**10:45-12:00 p.m.**  
GENERAL SESSION

***The Utilization of Clinical Resources in Defending  
Disability Claim Decisions***

**Mark D. Greenberg, Esq., Greenberg & Lagomasino, P.A.**

**Sally Kolitz Russell, Ph.D., Clinical Psychologist, Neuropsychologist**

**Lisa Newell, ALHC, FLMI, Director-Disability Management  
Services, Inc.**

This presentation will explore **How**, **When**, and **What** are the best ways to use clinical experts in disability claim reviews. The topics for discussion will include:

- Objective vs. subjective impairment: what constitutes sufficient information to support a claim decision?
- Expert opinion vs. treating doctor: how and when to use an independent expert.
- Current legal issues: how to prepare your case for outside counsel.

Attendees will benefit from three different perspectives: claims, clinical, and legal.

**12:00-1:00 p.m.**

LUNCHEON

Sponsored by



**1:00-2:15 p.m.**

GENERAL SESSION

***Current Approaches, Tools, and Resources  
In the Assessment of Complex Claims***

**Patricia Bailer, M.A., Individual Disability Claims and Account  
Manager-JHA**

**Janet Beattie, M.S., CRC-JB Productions**

**Linda Millar, ALHC, FLMI, Asst. Vice President-Swiss Re Life Ins. Co.**

This interactive presentation will discuss important tools, techniques, and resources for gathering detailed and pertinent claim information. Attendees will exchange ideas on claim management approaches such as:

- **What** are the latest and most effective claim management tools to assist in making appropriate decisions.
- **How** to verify occupational duties and assess this information in the context of vocational impairment.
- **When** to request and how to best use IMEs.

**2:15-2:45 p.m.**

REFRESHMENT BREAK

Sponsored by CS Claims



**2:45-4:00 p.m.**

CONCURRENT SESSIONS (*choose one*)

***A. Evaluating Functional Impairment in Closed  
Head Injury and Psychiatric Conditions***

**David Bush, Ph.D., Diplomate in Clinical Neuropsychology**

**Sally Kolitz Russell, Ph.D., Clinical Psychologist, Neuropsychologist**

These two experts will discuss the complex issues confronting claim professionals in evaluating and addressing the validity of symptom complaints and clinical presentation in the context of head injury and psychiatric conditions. Recent head injury research findings provide a range of objective criteria that help distinguish injury effects from non-injury factors and these studies will be reviewed from the standpoint of clinical diagnosis.

Evidence-based strategies for assessing effort, motivational effects, and symptom exaggeration in psychiatric conditions will be discussed. Outcome data that pertains to various clinical conditions of interest will also be described. Workshop attendees will gain an appreciation of how objective criteria can be utilized to increase the accuracy of the claim assessment process.

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***B. Medical Mysteries: Evaluating the Subjective Claim***

*David E. Hartman, Ph.D., ABPN, Medical and Forensic Neuropsychologist - Isaac Ray Center for Psychiatry and Law at Rush Presbyterian St. Lukes Hospital in Chicago, IL*

*James F. Jones, M.D., - Allergist Immunologist Virologist Centers for Disease Control and Prevention, Atlanta, GA*

This session will examine the complexities in the evaluation of subjective claims such as chronic fatigue syndrome and multiple chemical sensitivities. These presenters will discuss clinical assessment, treatment, prognosis, and current controversy in the medical community surrounding these diagnoses. This discussion will provide the claim professional with essential information and new tools that will enhance the fair and objective review of claims involving these and similar conditions.

**6:00-7:30 p.m.**

POOLSIDE/BEACHSIDE RECEPTION

Sponsored by Proedge Group



**Friday, April 30**

**7:30- 8:30 a.m.**

CONTINENTAL BREAKFAST

Sponsored by Swiss Re Life Ins. Co.



**8:30-9:45 a.m.**

GENERAL SESSION

***Impaired Professionals with Chemical Dependency and Substance Abuse Claims - Varying Viewpoints***

*Todd M. Antin, M.D. - CEO of PACT, Atlanta, LLC,-Chief of Department of Psychiatry DeKalb Medical Center, Atlanta, GA*

*Nick DeFillipis, Ph.D., ABPP, ABPN,-PDC SPAN Consultant, - Professor Georgia School of Professional Psychology Atlanta Psychological Associates*

*Philip O. Wilson, M.D., Attending Physician - Talbott Recovery Campus, Atlanta, GA*

Can an anesthesiologist with dependency issues recover and successfully return to work? Will multiple relapses by physicians automatically eliminate return to work in their occupations? What is a reasonable expectation for return to work after a period of abstinence and recovery? These questions and many others will be discussed and debated in this exciting session with substance abuse experts who have treated, independently examined, and rehabilitated impaired professionals. These experts will explore their sometimes divergent positions and consider how consensus can be achieved between the insured, the disability carrier, the professional organization, and the treating professional.

**9:45-10:15 a.m.**

REFRESHMENT BREAK

**10:15-11:30 a.m.**

GENERAL SESSION

***Risk of Disability in Psychiatric and Complex Medical Claims***

*Vladimir Coric, M.D., Assistant Clinical Professor in Psychiatry, Chief of Inpatient Services Clinical Neuroscience Research Unit, Forensic Psychiatrist Division of Law and Psychiatry, Yale University School of Medicine*

*J. Michael Gaziano, M.D., MPH, Cardiologist,-Brigham and Women's Hospital and Harvard Medical School, Boston, MA*

This session will discuss the meaning of "*Risk of Disability*" and provide attendees with a clear understanding of how to identify and address the relevant issues that may arise in medical and psychiatric claims. Importantly, these experts will provide instruction regarding:

- **When** and how a condition (e.g. cardiac, psychiatric, or dual diagnosis) has been determined stable.
- **How** and where to identify resources to help clarify when the issue of risk can be discussed in the context of the policy and the claim.
- **When** to consider the issue of "risk of disability" versus impairment.
- **How** to approach the management of "risk of disability" claims with the insured, the treating provider, or others involved in the claim.

**11:30 a.m. -12:30 p.m.**

GENERAL SESSION/WRAP-UP

***Resolution Strategies for Disputed Subjective Claims***

*Kathleen S. Brennan, M.S., CRC, LRC, Asst. Vice President-PDC, Inc.*

*Andrew J. Cohen, Esq., General Counsel - Disability Management Services, Inc.*

This concluding session will review the topics and strategies presented during the *Disability Experts Forum*. The speakers will review case studies and discuss many of the challenges of subjective claims such as:

- Accurately analyzing claim information.
- Developing an efficient plan for accurately evaluating the claim.
- Managing conflict.
- Making the right decisions.

**12:30-1:30 p.m.**

LUNCHEON

Sponsored by ICS



INTERNATIONAL CLAIMS SPECIALISTS

**1:30 p.m.**

CONFERENCE ENDS

**PDC 2004 DISABILITY EXPERTS FORUM  
SANDESTIN GOLF & BEACH RESORT  
APRIL 28 - 30, 2004**

**Registration Fees**

**Register by January 15, 2004**

Attendee . . . . . \$500

**Register after January 15, 2004**

Attendee . . . . . \$550

**Special discounted registration fee**

For each additional attendee

from any firm or company

registering more than two (2)

representatives . . . . . \$400

**Spouse/Guest Fee** . . . . . \$200

**Closing Date** . . . . . March 12, 2004

**Spouse/Guest Information**

**PDC 2004 Disability Experts Forum** attendees are welcome to bring their spouse/guests to the resort. However, any additional hotel room costs are the sole responsibility of the conference attendee. The \$200 spouse/guest fee includes attendance at the Keynote Speaker General Session on Thursday, April 29th and all evening functions.

To bring a spouse/guest, please complete the appropriate section on the **Registration Form** included in this program.

Children may not attend any of the general sessions, concurrent sessions or scheduled functions.

**Hotel Information**

Surrounded by the natural beauty of Choctawhatchee Bay and built to reflect five centuries of architecture, history and culture along the Gulf Coast, the Village of Baytowne Wharf, which opened in May 2002, brings a whole new dimension to a Sandestin stay.

The Village features a unique collection of specialty merchants ranging from quaint boutique shops and charming eateries to lively nightclubs - all set against a backdrop of vibrant special events and entertainment for all ages.

The Village of Baytowne Wharf features handsome, luxury accommodations. Many rooms offer balcony views of Sandestin's famous sunsets. Sandestin boasts an unforgettable stretch of snowy white beaches, every imaginable water sport, award-winning tennis, luxurious clubhouses, dining, and four championship golf courses.

**Hotel Reservations**

Make your reservations directly with Sandestin Golf & Beach Resort. For your convenience, a **Housing Request Form** is included with this program. Please complete the **Housing Request Form** and either fax, mail, or call:

**FAX**

Sandestin Group Reservations  
850-267-8221

**MAIL**

Sandestin Group Reservations  
9300 Emerald Coast Parkway West  
Sandestin, Florida 32550

**CALL**

Refer to:  
Group Code# 470519:  
Sandestin Group Reservations  
800-320-8115

**Hotel Rate**

The hotel rate for registered conference attendees is \$135.00 per night for single or double occupancy plus applicable taxes. For those who plan to extend their time at the resort, this room rate may be available up to three days before and three days after the meeting. Space is limited, so please make your reservations by **March 12, 2004**. The resort will make every effort to accommodate you. However, if discounted rooms are no longer available, hotel rates will vary depending on location and occupancy.

**Hotel Check-In and Check-Out Times**

Check-In Time: 4:00 p.m.  
Check-Out Time: 11:00 a.m.

**Special Accommodations**

If you require special services or accommodations, please alert the hotel staff when making your reservation. Also, please include this information and any special dietary needs on your **Registration Form** included in this program.

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**APRIL 28 - 30, 2004**

**Shuttle Service**

Shuttle service provided by Bahama Babbitt's Beachside Limo and Airport Shuttle is available from Ft. Walton Beach, Panama City and Pensacola airports. **Reservations are required in advance and no later than 3 days prior to your arrival.** To meet the shuttle service, please proceed to your designated Baggage Claim area and a representative from Bahama Babbitt's will be there to greet you.

To make your reservation, please complete the **Shuttle Reservation Form** included with this program and **fax** it to:

Bahama Babbitt's  
Beachside Limo and Airport Shuttle  
**850-837-0519**

Bahama Babbitt's shuttle service vans will pick up passengers according to the flight information received. Every attempt will be made to monitor your flight and react to delays or early arrivals.

If you change your flight or should it be cancelled, please call:

Bahama Babbitt's  
Beachside Limo and Airport Shuttle  
**850-865-6900**

**Weather**

The temperature at Sandestin Beach and Golf Resort in late April averages a high of 77° and a low of 60°.

**Dress Code**

Business casual attire is recommended for all business sessions and evening functions.



**Elephant Walk Restaurant**

**Airports & Car Rental**

Ft. Walton Beach-Eglin AFB-Okaloosa Regional Airport (VPS) is a 30 minute drive to Sandestin. **Air Service Carriers:** Delta, Northwest Airlines, Continental, and USAir Express. **Car Rentals:** Avis, Hertz, Budget, National and Enterprise.

Panama City Bay County Airport (PFN) is a 50 minute drive to Sandestin. **Air Service Carriers:** Delta, Northwest, USAir Express. **Car Rentals:** Avis, Hertz, Budget, National and Dollar.

Pensacola Airport (PNS) is a 90 minute drive to Sandestin. **Air Service Carriers:** American West, American Airlines, Continental, Delta, United Airlines, Northwest, USAirways, Transworld Airlines and AirTran. **Car Rentals:** Avis, Hertz, Budget and National.

**Driving Directions**

Detailed maps and driving directions are available through Sandestin's website: [www.sandestin.com](http://www.sandestin.com).



**The Grand Sandestin**

**Fax#: 413-747-9376**

**PDC 2004 DISABILITY EXPERTS FORUM**

April 28-30, 2004  
Sandestin Golf & Beach Resort  
Destin, Florida

**Registration Form**  
(Please photocopy for each attendee)

(Please print in ink)

Full Name: \_\_\_\_\_ Professional Designations: \_\_\_\_\_

Name of Company: \_\_\_\_\_ Your Title: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ E-mail address: \_\_\_\_\_

Bus. Phone: \_\_\_\_\_ Bus Fax: \_\_\_\_\_

Will you be registering a Spouse/Guest?  Yes  No

**Name Badges:**

First Name on Badge \_\_\_\_\_ Spouse/Guest Name: \_\_\_\_\_

**Special Accommodations:**

Do you have any special dietary needs? If yes, please describe: \_\_\_\_\_

Do you need any special accommodations? If yes, please describe: \_\_\_\_\_

**Registration Fee:**

*If you register by January 15, 2004*

\$500 for each attendee

*If you register after January 15, 2004*

\$550 for each attendee

**Special discounted registration fee**

\$400 for each additional attendee from any firm or company registering more than two (2) representatives

**Spouse/Guest fee**

\$200 for each attendee

**Closing Date: March 12, 2004**

**Concurrent Sessions**

Thursday, April 29, 2004  
2:45-4:00 p.m.

**Please choose one:**

- Evaluating Functional Impairment in Closed Head Injury and Psychiatric Conditions
- Medical Mysteries: Evaluating the Subjective Claim

**Refund policy:** All cancellations and refund requests must be in writing. Full refunds minus a \$50.00 administrative fee, will be granted on written requests received no later than **April 14, 2004**. If for any reason the meeting is cancelled, PDC will refund the total registration fee. However, PDC will not be responsible for any travel, lodging or other costs incurred.

Please fax this form to PDC at 413-747-9376. Please make check payable to PDC, Inc. and mail your payment to PDC, Inc., 1350 Main Street, Suite 1600, Springfield, MA 01103, credit cards are not accepted. Registration form will not be processed without payment. Any questions, please call PDC at 800-463-0095 or visit our website: [www.pdcnetwork.com](http://www.pdcnetwork.com).

**Hotel reservations must be made directly with Sandestin Golf & Beach Resort**

**For Office Use Only:** Date Received: \_\_\_\_\_ Amount Paid: \_\_\_\_\_

## Schedule of Events

### Wednesday, April 28

<b>4:00 p.m.</b>	<b>8:00 p.m.</b>	<b>Registration</b>
<b>6:30 p.m.</b>	<b>8:00 p.m.</b>	<b>Welcome Reception</b>

### Thursday, April 29

<b>7:30 a.m.</b>	<b>8:30 a.m.</b>	<b>Registration</b>
		<b>Continental Breakfast</b>
<b>8:30 a.m.</b>	<b>9:00 a.m.</b>	<b>Welcoming Remarks</b>
<b>9:00 a.m.</b>	<b>10:15 a.m.</b>	<b>Keynote Speaker-Chris Carr, Ph.D.</b>
<b>10:15 a.m.</b>	<b>10:45 a.m.</b>	<b>Refreshment Break</b>
<b>10:45 a.m.</b>	<b>12:00 p.m.</b>	<b>General Session</b>
<b>12:00 p.m.</b>	<b>1:00 p.m.</b>	<b>Luncheon</b>
<b>1:00 p.m.</b>	<b>2:15 p.m.</b>	<b>General Session</b>
<b>2:15 p.m.</b>	<b>2:45 p.m.</b>	<b>Refreshment Break</b>
<b>2:45 p.m.</b>	<b>4:00 p.m.</b>	<b>Concurrent Sessions</b>
<b>6:00 p.m.</b>	<b>7:30 p.m.</b>	<b>Poolside/Beachside Reception</b>

### Friday, April 30

<b>7:30 a.m.</b>	<b>8:30 a.m.</b>	<b>Continental Breakfast</b>
<b>8:30 a.m.</b>	<b>9:45 a.m.</b>	<b>General Session</b>
<b>9:45 a.m.</b>	<b>10:15 a.m.</b>	<b>Refreshment Break</b>
<b>10:15 a.m.</b>	<b>11:30 a.m.</b>	<b>General Session</b>
<b>11:30 a.m.</b>	<b>12:30 p.m.</b>	<b>General Session/Wrap-up</b>
<b>12:30 p.m.</b>	<b>1:30 p.m.</b>	<b>Luncheon</b>
	<b>1:30 p.m.</b>	<b>Conference ends</b>