



CALIFORNIA APPLICANTS'
ATTORNEYS ASSOCIATION



STAY AHEAD LEAD THE WAY

January 25 - 28, 2024
Westin Rancho Mirage Golf Resort & Spa

CONVENTION SCHEDULE

1:00 P.M. - 2:00 P.M. | TECHNOLOGY TRENDS: CHATGPT, AI, EMAILS & REMOTE INTERVIEWS

- How can AI - the wave of the future - be helpful or hurtful?
- Help! I'm drowning in emails...
- Using technology to make the practice easier including email service, electronic signatures & keeping applicants informed.
- Downsides to the remote world including assessing applicant's injuries during a remote intake & lack of connection with applicants.

Panelists: Scott Ford, Esq. (moderator); Benjamin Helfman, Esq.; Amanda Poe, Esq., Alicia Villanueva, Esq.

1.00 MCLE | 1.00 LS

2:00 P.M. - 2:30 P.M. | BREAK - VISIT VENDORS IN EXHIBIT HALL

2:30 P.M. - 3:45 P.M. | ARE YOU THERE DOCTOR, IT'S ME MARGARET?

- Ensuring applicants accurately describe all their symptoms to treating doctors including dealing with cultural differences.
- Doctors' perspectives of what they need to hear and see from applicants during an exam.
- Ensuring doctors address all the applicant's symptoms.
- Preparing clients for the PQME exam.

Panelists: Lisa Hernandez, Esq. (moderator); Paul Jain, M.D.; Steven Meier, M.D.; Vivien Nichols

1.25 MCLE | 1.25 LS

3:45 P.M. - 4:15 P.M. | BREAK - VISIT VENDORS IN EXHIBIT HALL

4:15 P.M. - 5:15 P.M. | THE FIRST 90 DAYS: APPLICANT, DEFENSE & JUDICIAL PERSPECTIVES

- Conducting the applicant intake interview to create a litigation plan.
- Responding to defense opening requests including medical releases and disclosing prior disabilities.
- What does a defense opening litigation plan look like?
- The defense duty to conduct a reasonable and timely investigation per Regulation §10109.

Panelists: Christel Schoenfelder, Esq. (moderator); Zachary Kweller, Esq.; Scott Tilley, Esq.; Honorable John Cyprien

1.0 MCLE | 1.0 LS

FRIDAY, JANUARY 26TH | DOCTOR'S SESSION

8:30 A.M. - 10:00 A.M. | IS YOUR QME LICENSE AT RISK? TOP 5 KEYS TO SUCCESSFUL REPORT WRITING

- What is an accurate explanation of causation of injury and causation of disability?
- Know the Case Law and Regulations, not just the crumbs but the entire cake.
- Knowing the how and why standard for apportionment analysis.
- Why are they taking my deposition?! We will tell you why, and how to prepare for the deposition.
- The mandate to consider and discuss the vocational experts' report and the consequence of the failure to do so.

Panelists: Lawrence Stern, Esq. (moderator); Taylor Arnold, Esq.; Steven Feinberg, M.D.; Arthur Lipper, M.D.; Honorable Myrle Petty

1.5 QME Credits Pending Approval

8:30 A.M. - 9:30 A.M. | BACK TO BASICS: PQME PANELS & STRATEGIES

- Controlling discovery through the PQME process.
- Using the DIR PQME Database as a resource.
- Obtaining additional and replacement panels and what to do if defense objects.
- Strategies for dealing with a PQME report that isn't substantial medical evidence.

Panelists: Robert Wyman, Esq. (moderator), Seydi Morales, Esq.; Michael Misa, Esq.; Honorable Adam Graff

1.00 MCLE | 1.00 LS

9:30 A.M. - 10:00 A.M. | BREAK - VISIT VENDORS IN EXHIBIT HALL

10:00 A.M. - 11:15 A.M. | CHOOSING THE RIGHT PQME SPECIALTY TO MAKE OR BREAK YOUR CASE

- Choosing the right PQME specialty based on how the case is pled.
- What is the difference between various PQME specialties.
- Doctors' perspectives on how they assess injured worker evaluations.
- Doctors' insights into how they write their reports.

Panelists: Jason Marcus, Esq. (moderator); Lawrence Miller, M.D.; Laura Wertheimer-Hatch, M.D.; Lisa Wolf, Psy.D.; Honorable Alicia Hawthorne

1.25 MCLE | 1.25 LS | 1.0 QME Pending

11:15 A.M. - 12:45 P.M. | GENERAL MEMBERSHIP MEETING (FOR REGULAR MEMBERS ONLY. BOX LUNCH PROVIDED)

12:45 P.M. - 1:00 P.M. | BREAK - VISIT VENDORS IN EXHIBIT HALL

1:00 P.M. - 2:15 P.M. | COMMISSIONERS' PANEL

Panelists: Chairperson Katherine Zalewski (invited); Commissioner Jose Razo (invited); Commissioner Katherine Dodd (invited); Commissioner Craig Snellings (invited); Commissioner Joseph Capurro (invited); Commissioner Natalie Palugyai (invited); Anne Schmitz, Secretary; Deputy Commissioner (invited)

1.25 MCLE | 1.25 LS

2:15 P.M. - 2:45 P.M. | BREAK - VISIT VENDORS IN EXHIBIT HALL

2:45 P.M. - 4:45 P.M. | MARVIN SHAPIRO MEMORIAL MOST IMPORTANT CASES INCLUDING BREAKING NEWS CONVERSATION ABOUT NUNES

- The esteemed panel provides a critical review of the significant cases from the last six months.

Panelists: : Megan Ruble, Esq. (Moderator); William Herreras, Esq.; Larry Silver, Esq.; Justin Sonnicksen, Esq.; Colleen Casey (Ret. WCJ)

2.0 MCLE | 2.0 LS

SATURDAY, JANUARY 27TH

9:00 A.M. - 10:15 A.M. | WHAT ARE COURTS TELLING US TODAY ABOUT ACCURATE IMPAIRMENT?

- How the law on Almaraz/Guzman and Kite has developed over the years.
- Tables, charts and figures in the AMA Guides to establish accurate impairment.
- When to use addition to establish accurate impairment.
- Using CAAA's Practice Tips and Pearls of the AMA Guides as resources.

Panelists: Adam Dombchik, Esq. (moderator), Brad Chalk, Esq.; Mark Ganjianpour, M.D.; Honorable Diana Marsteiner

1.25 MCLE | 1.25 LS | 1.0 QME Pending

10:15 A.M. - 10:45 A.M. | BREAK - VISIT VENDORS IN EXHIBIT HALL

10:45 A.M. - 12:15 P.M. | CROSS-EXAMINATION TACTICS: THE MOCK DEPOSITIONS

- Observe mock depositions covering Almaraz/Guzman, Kite, and apportionment.
- How to deal with a hostile doctor witness.
- How to deal with a hostile defense attorney.
- Attendees will receive transcripts of the mock depositions.

Panelists: Tiffany Speers, Esq. (moderator); Scott Rubel, Esq.; Michael Giachino, Esq.; Maureen Miner, M.D.; Mark Mandel, M.D.

1.5 MCLE | 1.5 LS | 1.0 QME Pending

SUNDAY, JANUARY 28TH

9:00 A.M. - 10:15 A.M. | ETHICS: THE STATE BAR RULES YOU NEED TO KNOW

- New State Bar rule compelling attorneys to report misconduct.
- State Bar rule on referral fees.
- Using CAAA's Practice Tip on referral fees as a resource.
- Dealing with fee splits including third party cases.

Panelists: Chris Viadro, Esq. (moderator); Dane Gilliam, Esq. Julie Oktanyan, Esq.; Ellen Pansky, Esq.

1.25 ETHICS

10:15 A.M. - 10:30 A.M. | BREAK

10:30 A.M. - 12:00 P.M. | RECOGNIZING, DISRUPTING, AND ELIMINATING BIAS

- Understanding bias and its role in behavior.
- Developing strategies for reducing bias in the workplace, physician's office, and life.
- Identifying intersectionality and its role in bias.
- Building alliances in action around the principles of justice, equity, diversity, and inclusivity (JEDI).

Panelists: Analisa Swan, Esq. (moderator); Juliana Guerriero, Esq.; Denise Kuper, Esq.; Tracy Mansfield, Esq.; Christy Holstege, Esq.; Marc Nehorayan, M.D.; Honorable Jay Downey

1.5 Recognition and Elimination of Bias