# 2024 LB Payne Insurance Seminar:

Title: Good Faith Estimates and the No Surprises Act

Speaker: Marc Abla, CAE

1 CE

# **Description:**

The No Surprises Act's primary purpose is to ensure that patients do not receive health care bills that far exceed their awareness or expectations. Although the most heralded portions of the law (usually pertaining to hospital services) do not apply to most chiropractic physicians, another key provision pertaining to <u>"good faith estimates" does apply chiropractic offices</u>.

This course is designed to help attendees understand the requirements for Good Faith Estimates (GFE) and implementation strategies for their practice. We will cover what GFEs are, who should receive them, when they should receive it, and other specific requirements related to Good Faith Estimates. Join Marc Abla, CAE in finding the best strategies for your practice to achieve and remain in compliance with the No Surprises Act.

# **Objectives**

After attending this course, each attendee should be able to understand and implement the Good Faith Estimate requirements under the No Surprises Act.

Outline:

- 1. No Surprises Act and Good Faith Estimates Background
- 2. What are Good Faith Estimates (GFEs)
- 3. Who Is Entitled to Receive a GFE?
- 4. How Will Patients Know About the GFEs?
- 5. How to Implement the New GFE Requirements
- 6. When is the Good Faith Estimate Given to Patient?
- 7. Other Services Provided by Outside Entities (i.e., lab work)
- 8. GFE Required Elements
- 9. Dispute Resolution Process

# Marc Abla, CAE

2305 N. Elizabeth St. ▲ Decatur, Illinois 62526 (217) 341-3023 ▲ marcabla1@gmail.com

# **EDUCATION**

**INDIANA UNIVERSITY** Bachelor of Science in Business Administration (Accounting; Management and Administration)

# **PROFESSIONAL AFFILIATIONS AND SERVICE**

Member of the Congress of Chiropractic State Associations (ChiroCongress) (District Director – ChiroCongress Board of Directors, 2019 - Current)

Chiropractic Future Strategic Plan (Chairperson – Leadership Committee, Member – ChiroTech Consortium Workgroup)

Member of the Illinois Society of Association Executives (Director at Large – Illinois Society of Association Executives Board of Directors, 2009-2011)

Member of the American Society of Association Executives

Member of the American Chiropractic Association

Member of the Association Forum

# **PROFESSIONAL CERTIFICATION**

CERTIFIED ASSOCIATION EXECUTIVE (CAE) - 2009-2021

#### **PROFESSIONAL EXPERIENCE**

#### ILLINOIS CHIROPRACTIC SOCIETY – SPRINGFIELD, ILLINOIS (OCTOBER 2002 – PRESENT) Executive Director (2008 – Present)

Chief staff executive for the largest chiropractic association in Illinois answering directly to the Board of Directors and leading direct reports that include Directors of Education, Communications, Governmental Relations, and General Counsel. Responsible for carrying out and implementing the direction, goals, and policies established by the Board of Directors. Advise the Board of Directors on opportunities and feasibility of the direction considered by the Board of Directors.

#### Director of Professional Relations (2002 – 2007)

Served as the "deputy director" answering directly to the Executive Director and accountable for the direct supervision of the Office Administrator and the Director of Member Services and Sales.

#### CLIFTON GUNDERSON LLP - OAKBROOK, ILLINOIS (2000 – 2002)

#### Software Sales Specialist, Blackbaud

This position answered to a firm Partner and had no direct reports. The primary function was to sell accounting products to not-for-profit organizations.

# R.E. KOTERIE - DECATUR, ILLINOIS (1999 - 2000)

#### Director of Finance / Owner

<sup>2</sup>Managed all accounting and back-office operations including financial analysis. Created software to track the current

work in progress of homes. Discovered and negotiated new sources of financing. Managed the timing for the appropriate draws minimize expenses. Developed relationships with clients while ascertaining the specifics of their homes. Negotiated with lenders on behalf of clients.

#### CAPITAL ASSOCIATES INTERNATIONAL, INC. - LAKEWOOD, COLORADO (1991 – 1999) Assistant Controller, CAI Retail Division (Name Brand Computer Outlet)

Developed and monitored financial packages including financial statements, forecasted financial statements, business models and management reporting. Worked with the controller in the creation of policies and procedures on accounting, financial reporting and performance measurements. Assisted in the oversite of the ground up creation and continued maintenance of the company's asset tracking system in Microsoft Access.

#### Lease Acquisition Specialist

Located third party lessors, banks and brokers having equipment lease transactions available for sale and negotiated final purchase price on transactions. Worked closely with the lease administration and legal departments to assist with closings. Initiated discussion, developed the relationship, and negotiated the economic details of a \$70 million portfolio acquisition.

#### Budget Coordinator/ Marketing Analyst

Prepared and monitored annual budgets. Developed and implemented an automated weekly financial projection utility. Created automated budgeting software including the corporate business plan, public income fund modeling utility and lease securitization model. Performed a variety of financial analysis tasks. Monitored and analyzed marketing data to provide the senior management team with information for decision making.

# **RECENT PUBLICATIONS (SELECTIONS) AND PRESENTATIONS**

A SIMPLE CHECK THAT CAN SAVE THOUSANDS (AND PREVENT SANCTIONS) www.ilchiro.org - Feb 17, 2021

WHEN SHOULD I PAY OVERTIME AND DO I HAVE TO PAY OVERTIME TO EVERY EMPLOYEE? www.ilchiro.org - Feb 10, 2021

COMMERCIAL DRIVER'S LICENSE AND THE NATIONAL REGISTRY OF CERTIFIED MEDICAL EXAMINERS www.ilchiro.org - Jun 24, 2020

**CORONAVIRUS (COVID-19) IN THE CHIROPRACTIC PHYSICIAN OFFICE** Contributing Author – www.ilchiro.org - Dec 28, 2020

**THE LEGAL PRACTICE OF MEDICINE IN ILLINOIS** Course Presenter – Illinois Chiropractic Society – 2014

**LEGAL WEBINAR SERIES (6 WEBINARS)** Course Presenter – Illinois Chiropractic Society - 2016

# MARKETING AUTOMATION FOR ASSOCIATIONS

 $Course\ Presenter-ChiroCongress-2019$ 

**TELEHEALTH 101: STRATEGIES FOR MAINTAINING CASH FLOW WHEN IN-OFFICE CARE IS NOT AN OPTION** Course Co-Presenter (Bertelsman) – Illinois Chiropractic Society – 2020

**TECHTRACK 2.0 – NAVIGATING THE CURES ACT, CARE PLAN ADHERENCE, AND PATIENT GOALS SUCCESSFULLY** Course Co-Panelist (Greenstein, Cost) – Florida Chiropractic Association - 2021

**DOCUMENTATION IN THE 21ST CENTURY – HOW REGULATIONS AND TECHNOLOGY ARE CHANGING THE GAME** Course Co-Presenter (Greenstein, Cost, Frogley) – Florida Chiropractic Association - 2021

# MANAGING RISK IN THE NEW AGE OF HEALTHCARE – HOW INTEROPERABILITY AND HEALTHCARE BENEFITS ARE DRIVING NEW CARE MODELS

Course Co-Panelist (Greenstein, Cost, Tolento) – Florida Chiropractic Association - 2021

# SHARING, BLOCKING, AND CHIROPRACTIC: A CURES ACT OVERVIEW

Course Presenter – ChiroHealthUSA Webinar Series – 2021

**KENTUCKY ASSOCIATION OF CHIROPRACTORS BOARD OF DIRECTORS PLANNING SESSION** Strategic Plan Facilitator – 2021

# **Medical Errors (2 Hours)**

Instructor: Gregg Friedman, D.C.

# Course Description:

In this presentation, Dr. Friedman will discuss the various ways in which documentation oversights can lead to issues and what chiropractors can do to minimize these errors. Real world case studies will be discussed regarding how to successfully navigate through the various documentation procedures.

# Course Objectives:

- 1. Discuss definition of malpractice
- 2. Illustrate the documentation oversights that can lead to errors
- 3. Discuss history findings that may alert the doctor to potential issues
- 4. Discuss how experts defend chiropractors
- 5. Illustrate the thought process of malpractice attorneys
- 6. Illustrate how social media can be used by attorneys
- 7. Discuss what doctors can do to minimize errors
- 8. Discuss the need for proper documentation after poor outcomes

# Course Content:

# Hour 1:

1. Case Study - Coronary Symptoms

A. The Story, What the Doctor Did, The Outcome, What We Can Learn

- 2. The Required Components of the Patient History
- 3. The Required Components of the Examination

# Hour 2:

- 1. Informed Consent
- 2. Tracking Progress
- 3. Case Study Vertebral Artery Dissection

A. The Story, What the Doctor Did, The Outcome, What We Can Learn

# **EDUCATION**

1979 – 1983 Arizona State University BS 1983 – 1986 Los Angeles College of Chiropractic DC

# PROFESSIONAL WORK EXPERIENCE

1987 - present - Doctor of Chiropractic - Phoenix/Scottsdale, Arizona

2006 – present - Got Documentation Seminars

2018 – 2023 - BulletProof Chiro, Inc.

2023 – present Chief Chiropractic Officer, ClinicMind, Inc.

# **PROFESIONAL AFFILIATIONS AND POSITIONS**

2012-2017 Member – Arizona Association of Chiropractic

2000 - 2015 Board of Directors, Arizona Chiropractic Society

2017 - present - Member, American Chiropractic Association

2019 - present - Member, American Academy of Professional Coders

2020 - present - Advanced Medicine Integration Group, LP - advisory board

2022 - present - ACA Medicare Advisory Board

2022 – present – member of Delphi panel, Council on Chiropractic Guidelines and Practice Parameters

# **POST-GRADUATE INSTRUCTOR**

University of Bridgeport/HSPED 2010 - present

ChiroCredit 2010 - present

Parker University 2017 – present

Palmer University 2022 – present

# **LECTURES GIVEN**

2001 - 2005 Bulletproof Seminars

2006 – presen	t Got Documentation - Clinical and Practical Documentation of Chiropractic
2008	Macomb County Chiropractic Association
2010 2012	Practice Perfect Oklahoma State Chiropractic Independent Physicians Association
2013	New Mexico Chiropractic Association Convention
2014	Arizona Association of Chiropractic Convention Alaska Chiropractic Society Convention
2015	Wyoming Chiropractic Association Convention
2016	Oregon Chiropractic Association Convention Connecticut Chiropractic Society Convention Nutri-West Symposium
2017	Florida Chiropractic Physicians Association Convention
2018	Alaska Chiropractic Society Convention Forward Thinking Chiropractic Alliance Convention Parker University Homecoming Nutri-West Symposium
2019	Forward Thinking Chiropractic Alliance Convention Parker Convention-Las Vegas Parker University Convention – Dallas
2020	Nutri-West Symposium Parker Convention-Las Vegas Parker University-Dallas American Specialty Health Got Documentation – 2 webinars per month
2021	Parker Convention – Virtual

Parker Convention - Orlando Parker University Convention – Dallas Texas Chiropractic College Convention – Galveston NCMIC New Doctors – Virtual Western States University – Virtual Palmer West University – Virtual Got Documentation – 2 webinars per month

2022 Parker Convention – Las Vegas Parker Convention – Orlando Parker Convention - Dallas

# CONTINUING EDUCATION

2008	Emergency Procedures 101 – University of Bridgeport Learning/Behavioral Disorders 101 – University of Bridgeport Emergency Procedures 102 – University of Bridgeport Physical Diagnosis 101 – University of Bridgeport Rehab 101 – University of Bridgeport Manipulation 103 – University of Bridgeport
2009	Whiplash: Trauma to the Head and Neck-Terry Yochum, DC, DACBR Documentation 150 – University of Bridgeport Documentation 151 – University of Bridgeport Documentation 152 – University of Bridgeport
2010	Documentation 153 – University of Bridgeport Emergency Procedures 104 – University of Bridgeport Documentation 150 – University of Bridgeport Pediatrics 113 – University of Bridgeport
2011	The Neglected Cervical Spine – Terry Yocum, DC, DACBR Physical Therapy 101 – University of Bridgeport Evidence Based Outcomes 204 – University of Bridgeport Documentation 154 – University of Bridgeport
2012	Chiropractic and Pregnancy 201 – University of Bridgeport

	Documentation 155 – University of Bridgeport Emergency Procedures 103 – University of Bridgeport Neurological Exam 101 – University of Bridgeport Pediatrics 101-105 – University of Bridgeport Pediatrics 108 - University of Bridgeport Pediatrics 114 - University of Bridgeport
2013	Nutrition 102 - University of Bridgeport Nutrition 103 - University of Bridgeport Nutrition 104 - University of Bridgeport Ortho 103 - University of Bridgeport Ortho 104 - University of Bridgeport X-Ray 129 - University of Bridgeport X-Ray 130 - University of Bridgeport X-Ray 131 - University of Bridgeport X-Ray 132 - University of Bridgeport X-Ray 135 - University of Bridgeport X-Ray 136 - University of Bridgeport X-Ray 137 - University of Bridgeport
2014	Documentation 101 – University of Bridgeport Boundary Training 101 – University of Bridgeport Boundary Training 102 - University of Bridgeport X-Ray 133 - University of Bridgeport Ortho 102 - University of Bridgeport Clinical and Practical Documentation of Chiropractic – AZ Board of Chiropractic Examiners
2015	Biomechanics 201 – University of Bridgeport Neurology 201 – University of Bridgeport Neurology 201a – University of Bridgeport Clinical and Practical Documentation of Chiropractic – AZ Board of Chiropractic Examiners
2016	Documentation and Record Keeping for Personal Injury – AZ Board of Chiropractic Examiners Management of Common Conditions 203 – University of Bridgeport X-Ray 127 – University of Bridgeport

	X-Ray 151 – University of Bridgeport Clinical and Practical Documentation of Chiropractic – AZ Board of Chiropractic Examiners
2017	Clinical and Practical Documentation of Chiropractic – AZ Board of Chiropractic Examiners Documentation 162 – University of Bridgeport Documentation 163 - University of Bridgeport Documentation 168 - University of Bridgeport Documentation 169 - University of Bridgeport Ortho 115 - University of Bridgeport Neurology 108 - University of Bridgeport
2018	Clinical and Practical Documentation of Chiropractic – AZ Board of Chiropractic Examiners American Academy of Motor Vehicle Injuries
2019	Clinical and Practical Documentation of Chiropractic – AZ Board of Chiropractic Examiners American Academy of Motor Vehicle Injuries
2020	Clinical and Practical Documentation of Chiropractic – AZ Board of Chiropractic Examiners Science of the Adjustment – Parker University Chiropractic Maintenance Care – Parker University Research is Shaping the Future of Chiropractic – Parker University The Lancet Low Back Pain Series – Parker University The Brain, Pain and the Neuroplastic Effects of Chiropractic Care – Parker University How Stress, Sleep Loss and Sedentary Living Create Inflammation, Pain and Depression – Parker University Post-Coronavirus PI Practice Strategy with Lawyers and MDs: Where MRI, Colossus and Documentation Fits – Academy of Chiropractic Certified Documentation Expert Outpatient Training – American Academy of Professional Coders
2021	Dynamic Foot and Ankle Adjusting and Manual Care – Parker University

Healing the Brain: Principles of Neuroplasticity

Manipulation 105 – OnlineCE/ChiroCredit Personal Injury 201 – OnlineCE/ChiroCredit Research Trends 119 – Online CE/ChiroCredit

2022 Neurodynamics and its Application to Clinical Practice-Part 1 – Parker University The Gut Microbiome in Health and Disease – Parker University
Stress, The Brain, Disease, and the Chiropractic Adjustment – Parker University A Prescription for Co-Creating Health Care with Our Patients – Parker University The Genius Life – Parker University
Livewired: The Inside Story of the Ever-Changing Brain – Parker University
Turning Trust into Treatment – Parker University
What Can I Charge My Medicare Patient to be Compliant? – Parker University
Functional Medicine – The Future of Personalized Medicine – Parker University
Audit Yourself Before Someone Else Does – Parker University
The Central Role of Uric Acid in Metabolic Health and Disease – Parker University

# 2024 LBP Payne Insurance Seminar:

# Hands-on Documentation Self-Audit to Build Success

# Speakers: Dr. Evan Gwilliam, Dr. Chris Anderson

# 6 CEs

Inadequate documentation is the leading cause for audits and negative outcomes when it comes to payer reviews. But it doesn't have to be that way. Drs. Evan Gwilliam and Chris Anderson will show you how they audit records and create notes that can satisfy the stingiest of third-parties. You will follow along as these certified compliance experts help you to develop bulletproof clinical documentation, achieve increased practice protection, minimize claim rejection, and maximize reimbursement. With this dynamic duo, this is a class you will not want to miss!

Outline/objectives:

# 2 hours: Become your own auditor

-Learn how payers define and use "medical necessity"

-Review key concepts and Medicare Guidelines for documentation

-Identify common documentation mistakes

-Learn the difference between initial (evaluation) and subsequent (treatment) visits

-Audit clinical examples from real cases

# 2 hours: Document bullet proof treatment plans

-Learn how to set goals that are useful and make sense

-Identify frequency and duration of care using evidence-based guidelines

-Find out what payers are looking for

-Apply the SOAP concept smoothly while satisfying all the criteria

-Understand how to demonstrate progress in daily visits

# 2 hours: Documenting the Top Codes for DCs

-Learn to document to match the codes

-Review coding guidelines, diagnostic indicators, modifiers, and sample documentation for:-

-Chiropractic manipulative treatment

- -Therapeutic procedures
- -Modalities

-Know when to use modifiers, and when not to

-For the top conditions diagnosed in chiropractic, identify:

--sample diagnostic tests

- --sample documentation
- --associated CPT codes
- --coding considerations



# Christopher R. Anderson DC, MCS-P,CIC,CCSP® 420 Viking Drive Reedsburg, WI 53959

DrChris@Andersonclinics.com

Education	<b>Certified Professional Compliance Officer</b> American Academy of Professional Coders	<b>C</b> urrently Enrolled
	Advanced Concussion in Sports for Kids and Teens for Physician American College of Sports Medicine	<b>is</b> 2021
	Certified Insurance Consultant Logan College of Chiropractic Chesterfield, MO 1994 #2153	2021-Present
	<b>DOT Physician Examiner</b> National Registry of Certified Medical Examiners	2020-Present
	<b>Certified Chiropractic Sports Physician</b> (120 Hours) American Chiropractic Board of Sports Physicians	2019-Present
	<b>EMT (Raylon Group)</b> Hennepin County Medical Center 730 S 8th St, Minneapolis, MN 55415	2018
	<b>Medical Compliance Specialist for the Physician</b> Dr. Mario Fucinari	2013
	Palmer College of Chiropractic Doctor of Chiropractic	2011
	<b>CPR/First Aid Instructor</b> American Heart Association	2010

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#### Awards and Honors

Friend of the Farm and Tractor Safety Program, UW Madison Sauk Co, ,2023 Excellence in Community Service, 4H Sauk County, 2022 Chamber Excellence in Community, Reedsburg Chamber of Commerce, 2020 Chamber Excellence in Service, Reedsburg Chamber of Commerce, 2019 Chamber Excellence in Community, Reedsburg Chamber of Commerce, 2018 Chamber Spirit Award, Reedsburg Chamber of Commerce, 2017 Wisconsin Chiropractic Association, Help Desk 2015-2022 Student Ambassador, Wisconsin Chiropractic Association, 2015-Present Outstanding Global Excellence Award, Palmer College of Chiropractic, 2015 Customer Service Award, Reedsburg Chamber of Commerce, 2015 First Impression Award, Reedsburg Chamber of Commerce, 2014 Outstanding Global Excellence Award, Palmer College of Chiropractic, 2014 Outstanding Global Excellence Award, Palmer College of Chiropractic, 2014 Outstanding Global Excellence Award, Palmer College of Chiropractic, 2013 Excellence in Radiology Service Award, Palmer College of Chiropractic, 2011 Excellence in Diagnosis Service Award, Palmer College of Chiropractic, 2011 Outstanding Global Excellence Award, Palmer College of Chiropractic, 2011 Palmer Clinical Excellence Award Candidate, Palmer College of Chiropractic, 2011

#### **Professional Experience**

Anderson Chiropractic Clinics 420 Viking Drive, Reedsburg WI 53959 115 East State St, Mauston WI 53948 Title: Executive Director Private Practice

Motiv8 Childrens Therapy 420 Viking Drive, Reedsburg WI 53959 Title: Executive Director ABA and Speech Therapy Clinic

OC Medical 1900 Washington Blvd. Ogden, UT 84401 Title: Compliance Director

Work Study Position: Lead Supervising Teaching Assistant Palmer College of Chiropractic, Davenport, IA Title: Teaching Assistant for Dr. Henery Brockington, D.C.

#### License (D.C.)

Wisconsin (2012) #4809-12

Task ForceFulcrum Health

Chair: Vivi-Ann Fischer

2017-2018

May 2011-Present

April 2023-Present

January 2015- 2020

February 2008-2011

#### **Publications**

ChiroCode Desk Book Reviewer and Contributor	
ICD 10CM Coding for Chiropractic	

2013,2014,2015,2016,2017,2018 2016,2017

#### **Professional Affiliations**

The Boy Scouts of America The National Eagle Scout Association American Chiropractic Association Wisconsin Chiropractic Association Chiropractic Society of Wisconsin Health Care Compliance Association American Academy of Professional Coders (AAPC) Sauk Co Farm and Tractor Safety Program Vice President of Reedsburg United Fund (**501(c)**)

Clinic Executive Director and Private Practice 20 Viking Dr Reedsburg, WI 53959	2012 - Presen
Chiropractic Care for an Onsite Industrial Clinic	2013 -2020
46 Second St, Reedsburg WI 104 B Academy St. Elroy WI tudent Preceptor-patient care: Chiropractic diagnosis and treatment; case-	2010-2011 -specific
Palmer College of Chiropractic, Davenport, IA	2010
Palmer College of Chiropractic, Davenport, IA	2010
Palmer College of Chiropractic, Davenport, IA Dutpatient care: Chiropractic diagnosis and treatment; case-specific	2010 cords
	<ul> <li>Anderson Chiropractic Clinics</li> <li>Clinic Executive Director and Private Practice</li> <li>Viking Dr Reedsburg, WI 53959</li> <li>15 East State St, Mauston WI53948</li> <li>Seats Private Care</li> <li>Chiropractic Care for an Onsite Industrial Clinic</li> <li>Reedsburg, WI 53959</li> <li>Anderson Chiropractic Office,SC</li> <li>46 Second St, Reedsburg WI</li> <li>104 B Academy St. Elroy WI</li> <li>tudent Preceptor-patient care: Chiropractic diagnosis and treatment; case- xaminations; radiography; physiotherapy; utilization of electronic records</li> <li>Department of Diagnosis &amp; Radiology: Physical Diagnosis T.A.</li> <li>Palmer College of Chiropractic, Davenport, IA</li> <li>Peaching Assistant for Dr. Paul D. Mullin, B.A., D.C.</li> <li>Department of Diagnosis &amp; Radiology: Gender Disorders T.A.</li> <li>Palmer College of Chiropractic, Davenport, IA</li> <li>Peaching Assistant for Dr. Stephanie C. O'Neill, B.S., D.C., DICCP</li> <li>Academic Health Center</li> <li>Palmer College of Chiropractic, Davenport, IA</li> <li>Dutpatient care: Chiropractic, Davenport, IA</li> <li>Dutpatient care: Chiropractic, Davenport, IA</li> </ul>

	Campus Health Center	2009
	Palmer College of Chiropractic, Davenport, IA	
	Student-patient care: Chiropractic diagnosis and treatment; case-specific	
	examinations; radiography; physiotherapy; utilization of electronic records	
	Department of Life Sciences: Microbiology	2008-2011
	Work Study Position: Lead Supervising Teaching Assistant	
	Palmer College of Chiropractic, Davenport, IA	
	Teaching Assistant for Dr. Henery Brockington, D.C.	
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# Teaching Experience

#### **Chiropractic Society of Wisconsin**

Wisconsin CSW Brain Trust (Help Desk) Consultant and Instructor

#### Wisconsin Chiropractic Association

Wisconsin

WCA Help Desk Consultant and Instructor

Topics: ICD 10, Documentation, Training, HIPAA, OSHA, Ethics, Chiropractic Assistant training, Coding, Compliance, E&M Management, Elements of a Care Plan, Counseling and Coaching ,Professional Boundaries, Risk Management, Clinic Guidelines, Leadership, Medicare, Claim Scrubbing, 1500 claim form, E&M 2021, CT Jeopardy!, many webinars and presentations.

#### **OG Medical Group**

Ogden Utah

Topics: ICD 10, Documentation, Training, HIPAA, OSHA, Ethics, Chiropractic Assistant training, Coding, Compliance, E&M Management, Elements of a Care Plan, Counseling and Coaching ,Professional Boundaries, Risk Management, Clinic Guidelines, Leadership, Medicare, Claim Scrubbing, 1500 claim form, E&M 2021, many webinars and presentations

#### Palmer College of Chiropractic

Davenport IA (Guest Lecturer) Topics E&M Management, Documentation, Coding, Compliance, Professional Boundaries, Medical Integration and Medicare

#### Northwestern Health Sciences University

Bloomington MN (Guest Lecturer) Topics: Documentation, Coding, Compliance, Professional Boundaries, and Medicare

#### State of Wisconsin - Chiropractic Board of examiners

Court Ordered Counseling and Coaching for Doctors

#### Numerous State Associations and Private Clinics

Topics: ICD 10, Documentation, Training, HIPAA, OSHA, Ethics, Chiropractic Assistant training, Coding, Compliance, E&M Management, Elements of a Care Plan, Counseling and Coaching ,Professional Boundaries, Risk Management, Clinic Guidelines, Leadership, Medicare, Claim Scrubbing, 1500 claim form, E&M 2021, many webinars and presentations

#### Subjects of Instructional Expertise

- Team (Staff/CA) Training
- Documentation
- Coding
- Compliance
- Medicare Guidelines and Regulations
- Risk Management
- ICD-10
- Medicare
- Clinical Guidelines
- Professional Boundaries
- HIPAA

#### Professional References

#### Mrs. Kristine Hudson

Vice President Of Business Relations
ChiroHealthUSA
250 Katherine Dr, Flowood, MS 39232
(888) 719-9990 x302

#### Dr Timothy Wakefield

\$295 Admirals Landing, Lancaster SC, 29720
 (715) 661-2393

# Dr Evan Gwilliam

249 S. Meadowbrook Ct, Saratoga Spring, UT, 84045
 (360) 904-0205

#### Ms. Emily Wood

Professional Relations Representative – Corporate Relations NCMIC Insurance Company 2 14001 University Ave. | Clive, Iowa 50325 (800) 247-8043, Ext. 4581

# Evan M. Gwilliam DC MBA BS CPC CCPC QMCC CPMA CPCO AAPC Fellow

360-904-0205 • DrGwil@gmail.com

Experienced physician and certified insurance coder and auditor

Dr. Gwilliam, Clinical Director for PayDC Chiropractic Software, graduated from Palmer College of Chiropractic as Valedictorian and is a Certified Professional Coder, and Certified Professional Medical Auditor and Compliance Officer. Because he is also a clinician with a Bachelor's degree in accounting and a Master's of Business Administration he is a sought-after seminar speaker. He provides expert witness testimony, medical record audits, consulting, and education for health care providers and has authored and contributed to reference books and articles for multiple publications.

# **Education & Certifications**

Bachelor of Science, Accounting, 2000 Doctor of Chiropractic, Valedictorian, 2003 Master of Business Administration 2013 Certified Professional Coder, magna cum laude, 2011 Nationally Certified Insurance Coding Specialist, 2011 Certified Chiropractic Professional Coder, 2012 ChiroCode Certified Chiropractic Professional Coder, 2012 Certified Professional Coder – Instructor, 2013 Medical Compliance Specialist – Physician, 2013 Certified ICD-10 Instructor, 2013 Certified ICD-10 Instructor, 2013 Certified MACRA/MIPS HealthCare Professional, 2016 Fellow, 2017 Certified Professional Compliance Officer, 2021

# **Career History**

PayDC SOFTWARE, Huntingdon Valley, PA

- Provide clinical guidance on software features
- Educate providers through training

# FINDACODE/CHIROCODE/BITS, Spanish Fork, UT

- Manage content for online and print materials
- Conduct training on location and via webinars
- Consult with clients on coding, compliance, and documentation issues
- Manage strategic relationships
- Oversee subject matter expert team and other staff

# VYNE EDUCATION, Nashville, TN

- Teach documentation and coding seminars around the country
- Create six hours of curriculum for physicians and coders

MOUNTAINLAND APPLIED TECHNOLOGY COLLEGE, Lehi, UT 18

Brigham Young University Palmer College of Chiropractic Broadview University American Academy of Professional Coders National Center for Competency Testing American Academy of Professional Coders ChiroCode Institute American Academy of Professional Coders Medical Compliance Training American Academy of Professional Coders American Academy of Professional Coders 4Med Approved American Academy of Professional Coders American Academy of Professional Coders

Clinical Director, 2017 to present

Vice President, 2012 to 2017

Speaker/Lecturer, 2011 to 2017

Instructor, Medical Coding, 2011 to 2013

# Articles:

Dozens for multiple publications in chiropractic and medical coding

# Speaker's Bureau, 2016-present Qualified Expert Witness, 2016, 2019

Post Graduate Faculty 2020, 2021, 2022 Post Graduate Faculty, 2020-present AMI Clinical Advisory Panel, 2020-present Continuing Education Speaker, 2021-present

Designed curriculum for adult students • Prepared students for Certified Professional Coder national exam

ALPINE SPINAL REHABILITATION, Provo, UT

Provided patient care

CAMAS CHIROPRACTIC CENTER, Camas, WA

- Patient care
- Coding, billing, and all other aspects of small business •

**Other Affiliations** Member, 2011-present American Academy of Professional Coders Member, 2011-2016 National Center for Competency Testing Editorial Board, 2012-2017 ICD10Monitor.com Member, 2012-2017 Utah Chiropractic Physicians Association American Chiropractic Association Member, 2013-2015 Webinar Education Faculty, 2013-2019 National Alliance of Medical Auditing Specialists Board Member, 2013-2017 Council on Chiropractic Guidance and Practice Parameters Speaker's Bureau, 2014-2017 ChiroTouch Software Speaker's Bureau, 2014-present **ChiroHealthUSA** Editorial Board, 2014-2015 Billing and Coding Advantage Magazine Post Graduate Faculty, 2015-2016 National University of Health Sciences Editorial Review Board, 2015-2016 Journal of the Academy of Chiropractic Orthopedists Speaker's Bureau, 2016-present NCMIC Insurance Infinedi Health Solutions Illinois Dept. of Financial & Professional Regulation Life University Northeast College of Health Sciences American Medical Integration Group, LP Parker University

# **Speaking and Teaching Experience**

Coding, auditing, compliance, anatomy, and documentation presentations for dozens of professional healthcare organizations.

- Dozens of seminars and live events from 2 hours to 12 hours in length since 2012 •
- Hundreds of 30 to 60-minute webinars since 2012 •

# **Publications**

Books:

- 2013, 2014, 2015, 2016, 2017, 2018, and 2019 ChiroCode DeskBook author/editor ٠
- Complete and Easy ICD-10 Coding for Chiropractic, 2<sup>nd</sup> edition, 2016, 2017, and 2018 editions author / editor
- ICD-10 Specialty books, InstaCode contributor / reviewer / editor •
- HIPAA Complete and Easy, 4th edition contributor / reviewer / editor •

Associate Doctor, 2010-2011

Doctor/Owner, 2003-2010

# 2024 LB Payne Insurance Seminar

# Speaker: Dr. Rachel Wendt

# Title: Kentucky Insurance Updates CEs: 2 Hours

This course will cover important updates to Kentucky, Medicaid, and the Division of Workers' Comp. We will dive deep into important requirements and reminders of medical necessity and documentation for your practice.

**Description:** This course will cover important updates to Kentucky, Medicaid, and the Division of Workers' Comp. We will dive deep into important requirements and reminders of medical necessity and documentation for your practice.

#### **Objectives**

- Understand how the MCO system operates in Kentucky
- Have an overview of documentation requirements for all carriers
- Understand common errors in billing using the latest data

# Outline (120 minutes):

- Review of
  - Common errors in billing using data
  - Proper modifier use
  - ICD-10 applicable updates
  - Excludes/includes codes
- Commercial Updates to Kentucky
  - Overview who are the players
  - Prior authorization changes and requirements
  - o Documentation required for each insurance company
  - Billing procedures to look for
  - Chiropractic policies
- Kentucky Medicaid Managed Care System
  - o Overview
- Worker's Compensation Review
  - Regulatory updates and changes
  - o 2022 2024 Fee Schedule
- How to review your insurance contract
  - $\circ$   $\;$   $\;$  Understand what to look for in your insurance contract
  - Review requirements for reimbursement including documentation required sections

	Rachel Wendt, DC
October 2023	
	Lexington, KY 40504 Cell: (630) 309 -9368 Office: (859) 554-4498 <u>rachelwendtdc@gmail.com</u> (personal) <u>DrWendt@thekac.org</u> (professional)
	versity of Health Sciences - Lombard, IL 2012   Doctorate of Chiropractic, Certified 100 hours in Acupuncture
Hope College	<u>– Holland, Ml</u>
09/2004 - 05/2	2008   Bachelor of Arts
	<u>th High School – Carol Stream, IL</u>
09/2000 - 06/2	2004
Lexington, KY 4	sociation of Chiropractors
Colorado Chi	ropractic Association
Denver, CO 802	
8/2016 - 5/20	021 - Executive Director
, , ,	016 - Interim Executive Director
10/2014 - 2/2	2016 - Director of Education and Member Development
Hatch Chirop	ractic and Wellness
Parker, CO 8013	34   02/2014-10/2014 - Chiropractic Physician
	<mark>icine Associates</mark> 540   06/2012-06/2013 - Chiropractic Physician
PROFESSION	AL AFFILIATIONS
	do Chiropractic Association
	Chiropractic Society
	cky Association of Chiropractors can Society of Association Executives
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- Congress of Chiropractic State Association
  - Secretary 2022 present
  - Executive Director at Large 2020 2022
  - District IV Director 2018-2020
- Chiropractic Future
  - Leadership Committee Director at Large 2019 2022
  - Leadership Committee Vice-Chair 2022 present

#### **SPEAKING ENGAGEMENTS**

- Kentucky Association of Chiropractors Kentucky Insurance Updates January 2023 | Louisville, KY
- Kentucky Association of Chiropractors Documenting Medical Necessity January 2020 | OnDemand
- Colorado Chiropractic Association Everything you need to know about Rule 22 May 2020
   | OnDemand
- Colorado Chiropractic Association Animal Chiropractic Jurisprudence October 2018 | Englewood, CO
- Academy for the Advancement of Animal Chiropractic Animal Chiropractic Jurisprudence and Navigating the Legal Process - April 2019 | Ft. Lauderdale, FL
- Congress of Chiropractic State Associations Technology PechaKucha on Ce21 November 2019 | San Diego, CA

#### **CERTIFICATIONS**

- Physiotherapy, Board Certified
- BLS and AED certified for the Healthcare Professional
- 100 Hours Acupuncture Certification
- NBCE Board Certified
- Licensed Chiropractor in the state of Colorado (#7199)
- Licensed Chiropractor in the state of Kentucky (#270909)
- Past Licensed Chiropractic Physician in the state of Illinois

#### **AWARDS AND HONORS**

- Presidential Award 2015 | Colorado Chiropractic Association
- Rising Star Chiropractor of the Year 2015, 2016 | Colorado Chiropractic Association
- Distinguished Chiropractor of the Year 2017, 2018 | Colorado Chiropractic Association

# <u>2024 LB Payne Insurance Seminar:</u> "The Technology Adjustment: The Secret to Grow Your Practice, Your Income, and Your Impact." Dr. Jay Greenstein CEs: 1 hour

**Course Description**: We are living in an unprecedented time of massive change – certainly in the world at large, and most definitely, in healthcare. While the last decade has focused on the value-based care proposition, triple aim (really quadruple when you include providers), new delivery models, and new payer models, simmering underneath all of those changes is a growing undercurrent with far greater reach. This soon to be tidal wave has the potential for both positive and negative impact. Rapidly evolving technologies – and meeting patients where they are (on their phones!) is creating a massive opportunity to improve patient outcomes and provider income. The application of this technology is already beginning to have large scale impact. Empowering patients to create improved lifestyle behaviors through mobile app technology drives better patient outcomes. In this course, we will discuss the background data that drove the evolution of the first mobile app in chiropractic to show significant behavior change for patients in attending their prescribed care plan visits and their home exercise adherence. The published study of over 4,000 patients and the second platform in development will be discussed.

# Learning Objectives:

- 1. Hour 1
  - a. Ensure the audience understands background data and clinical algorithm technology and its application to healthcare and chiropractic.
  - b. Ensure the audience understands evidence-based behavior change science and its application to healthcare and chiropractic.
  - c. Ensure the audience understands data privacy and security technology and its application to healthcare and chiropractic.
  - d. Review the clinical implications of big data and analytics in a 4,000-plus patient clinical study.
  - e. Build knowledge base on how data is being used to understand value creation in today's healthcare system.
  - f. Review the mobile health technology of gamification to improve treatment plan and home exercise compliance. Understand the key mechanisms to patient and provider behavior change to drive improved outcomes and create greater value for patients and the healthcare system.

# **References:**

- 1. <u>http://www.dynamicchiropractic.com/digital/index.php?i=1239&a\_id=58151&pn=42&r=t&Page=42</u>
- 2. <u>https://www.forbes.com/sites/bernardmarr/2015/04/21/how-big-data-is-changing-healthcare/#28ad73192873</u>
- 3. <u>https://www.forbes.com/sites/bernardmarr/2017/11/29/this-is-why-blockchains-will-transform-healthcare/#218e1ad01ebe</u>
- 4. <u>https://www.ncbi.nlm.nih.gov/pubmed/29805337</u>
- 5. <u>https://hbr.org/2018/03/ai-will-change-health-care-jobs-for-the-better</u>



# Curriculum Vítae

# Dr. Jay S. Greenstein, D.C., CGFI-L1, CKTP, FMS E-mail: DrJay@kaizo-health.com

# **EDUCATION:**

Bachelor of General Studies, Human biology/Business Administration, University of Maryland, 1983-1988

Bachelor of Science, National College of Chiropractic, September 1988- April 1992

Doctor of Chiropractic, National College of Chiropractic, September 1988- April 1992

Certified Chiropractic Sports Physician, Logan College of Chiropractic, April 1994-July 1995

Whiplash: The Masters Program, Spine Research Institute of San Diego, Module 1 and 2, February 25-26, 1995 and May 5-6, 1995; Module 3 - August 28-30, 1999

Peer Review Certification Course, New York Chiropractic College, August 13-15, 1999

Florida Workers' Compensation Course, Florida Division of Workers Compensation, Approval Number 0203025

Certified Golf Fitness Instructor, Level 1, Titleist Performance Institute, August 2007

Graston Technique Certified, M1 and M2, March 2008

Kinesiotape Certification Course K1, K2, K3 – CKTP

Functional Movement Screen Certified (FMS)

# **POSITIONS HELD:**

Chairman, Clinical Compass (Council on Chiropractic Guidelines and Practice Parameters) 2016 – 2019

Chairman, Corporate Social Responsibility Commission, Federation of International Chiropractic du Sport 2017 – present

Official Team Chiropractor, Washington Valor, Arena Football League 2018

Chiropractic Summit – Chair, Government Relations Committee 2014 - 2018

President, East Coast Association's Independent Physicians Network; 2012- present

State of Maryland's Governor's Office of Health Care Reform, Essential Health Benefits Committee 2012

Executive Advisory Board, Toward Injury Prevention in Sport 2012 – 2013

Healthcare Advisory Committee – Angie's List 2012

Consultant, ChiroHealthUSA 2011 - present

Federation of International Sports Chiropractic, Finance Commission 2011 - 2014

Approved Clinical Instructor – George Mason University, Department of Athletic Training 2011 – 2012

President, Sport and Spine Rehab Clinical Research Foundation 2010- present

Council on Chiropractic Guidelines and Practice Parameters (CCGPP), District Three Representative and Communications Chairman, 2009-2010 Vice Chair 2010-present

Advisory Board, FutureHealth Software 2009-2015

Healthcare Vertical Consultant and Advisory Board Member, Demandforce.com 2009 - 2011

Advisory Board, The Vitality Depot 2009 - 2012

Insurance Chair, Virginia Chiropractic Association 2009-2011

Chiropractic Professional Advisory Committee, Optum Health – Third Party Administrator for United Healthcare, 2009-2016

Federation of International Sports Chiropractic, Research Commission 2009 - 2014

Chef Du Mission - Director of Chiropractic Sports Clinic on behalf of the International Sports Chiropractic Association, World Olympians Association Reunion Center, Beijing Olympics August 2008

Healthcare Vertical Consultant, SuccessFactors 2008 -2010

Adjunct Professor, Shenandoah University Doctorate of Physical Therapy Program, 2007-2009

Thera-band Scientific Advisory Committee July 2007 – 2019

Clinical Instructor, Thera-Band Academy July 2007- present

Insurance Chairman, Maryland Chiropractic Association 2007-2011

Public Relations Chairman, Virginia Chiropractic Association 2007-2011

Treasurer and Sponsorship Chair, International Sports Chiropractic Association 2007-2012

Professional Affairs Healthcare Advisory Committee, American Specialty Healthcare Network, 2007-2015

Expert Consultant, The Roundtable Group, 2007-2010

National Football League Players Association recommended provider list, Washington Redskins, 1997-2003

Official Team Chiropractor Washington Redskins Cheerleaders, 1997-present

Official Chiropractic/Physical Therapy Provider, Westlake Football Club 2006 – 2007

Medical Advisory Board, Banner College 2007-2010

Healthcare Advisory Board, Eagle Bank 2006 – 2010

Official Team Chiropractor, Maryland Nighthawks, American Basketball Association, 2004

Chiropractic Representative, National Athletic Training Association, Inter-Association Task Force for Cervical Spine Injured Athlete May 1998, January 1999

Director of Research, Council on Sports Injuries and Physical Fitness, American Chiropractic Association, April1993-1998

Medical Director, National Rookie League, 2000-2001

Team Physician, Washington Justice, National Rookie League, 2000-2001

Maryland State Tae Kwon Do Association Medical Chairperson and team physician 1998 - 2002

Team Physician, Charles E. Smith Jewish Day School, Rockville, MD; February 1995-2001

Editorial Review Board, Journal of Sports Chiropractic and Rehabilitation, March 1995-2002

Secretary, Maryland Chiropractic Association Sports Council, November; 1994 - 1997

Quality Assurance and Peer Review Committee, Managed Chiropractic Network, March 1994-1996

Chiropractic Associate, Dr. Jan Corwin, D.C., C.C.S.P., 1988 U.S. Olympic Team Chiropractor, April 1992-April 1993

Senior Student Research Assistant, Spinal Morphometry Laboratory, National College of Chiropractic, September 1989-April 1992

Teaching Assistant, Department of Chiropractic, National College of Chiropractic, January -December 1990

# AWARDS:

Person of the Year, Council on Chiropractic Guidelines and Practice Parameters (CCGPP) 2013 Top Chiropractor, Northern Virginia Magazine 2013 Inc. 500|5000 Fastest Growing Private US Companies 2012 (#4645) Smart CEO Volt Award, Technology Implementer, Small Business Category 2012 Inc 500|5000 Fastest Growing Private US Companies 2011 (#4492) Service Excellence Award, American Chiropractic Association Council on Sports Injuries and Physical Fitness 2011 Chiropractor of the Year, Maryland Chiropractic Association, 2010

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Chiropractor of the Year, Virginia Chiropractic Association, 2010 Chiropractor of the Year, Maryland Chiropractic Association, 2007 Washington's Top Sports Physicians by *Washingtonian* Magazine, October 1995 Distinguished Service Award, American Chiropractic Association, Council on Sports Injuries and Physical Fitness, June 1995 Distinguished Service Award, American Chiropractic Association, Council on Sports Injuries and Physical Fitness, July 1994 Cum Laude graduate, National College of Chiropractic, April 1992 Who's Who in American Colleges and Universities, January 1992 National Dean's List-American Association of Higher Education, May 1991 All American Scholar Award- U.S. Achievement Academy, June 1991

# **CONSULTING:**

<u>Clinical:</u> A large percentage of clinical practice is devoted to diagnostic consulting on difficult and unusual cases referred by Physicians, Surgeons, Chiropractors and Attorneys.

<u>Medico-legal:</u> Dr. Jay S. Greenstein has been qualified as an expert witness and his expertise lies in narrative reporting and case-file review for attorneys and insurance companies. Dr. Greenstein provides IME's and peer reviews as part of his clinical practice. Dr. Greenstein provides independent medical examinations and paper review for insurance companies, such as Corvel insurance Company, Claims Review Associates (CRA), Nationwide Insurance, Concentra, MedEval, Inc., Support Claims Services, and Allegiance Health Medical, P.C.

<u>Industrial:</u> Dr. Jay S. Greenstein has developed and taught neuromusculoskeletal injury prevention programs for Sam's Club, Doubletree Hotels, Home Depot, Booz-Allen Hamilton, Safeway Food Stores and a variety of local, state and Federal Government Agencies.

<u>Corporate</u>: Dr. Jay S. Greenstein has taught courses on Six Sigma, Kaizen, Human Sigma and other business management tools for individuals, clinics and companies looking to improve their business performance. As well he consults with technology companies such as Future Health Software, and Demandforce.com.

<u>Health and Fitness:</u> Dr. Jay S. Greenstein has been asked to speak on prevention and rehabilitation of sports injuries at the Potomac, MD Community Recreation Center, Fitness First Gyms, Elite Athlete Training Systems, Results the Gym and World Tae Kwon Do Masters.

# **PROFESSIONAL MEMBERSHIPS:**

International Sports Chiropractic Association (ISCA) American Chiropractic Association (ACA) ACA Sports Injury Council Maryland Chiropractic Association Virginia Chiropractic Association Council on Chiropractic Guidelines and Practice Parameters (CCGPP) The Foundation for Chiropractic Progress

# **PUBLICATIONS:**

Cramer, G.; Howe, J.; Glenn, W.; Greenstein, J.; Marx, P.; Johnson, S.; Huntoon, R.; Cantu, J.; Emde, J.; and Aoys, M. 1991 Comparison of computed tomography to magnetic resonance imaging in the evaluation of the lumbar intervertebral foramen. Proceedings of the 1991 International Conference on Spinal Manipulation pp.186-190.

Cramer, G.; Howe, J.; Glenn, W.; Greenstein, J.; Johnson, S.; Huntoon, R.; Cantu, J.; Marx, P.; Aoys, M.; and Macken, D. 1992 Lumbar intervertebral dimensions from thirty-seven human subjects as determined by magnetic resonance imaging. Proceedings of the 1992 International Conference on Spinal Manipulation pp. 3-5.

Cramer, G.; Howe, J.; Glenn, W.; Greenstein, J. 1992 Comparative evaluation of the lumbar intervertebral foramen by computed tomography and magnetic resonance imaging. Clinical Anatomy 5; 238.

Greenstein, J; Cramer, G.; Howe, J.; Glenn, W.; Johnson, S.; Huntoon, R.; Cantu, J.; Marx, P.; and Macken, D. 1992 Comparison of 1.5 and 0.35 Tesla magnetic resonance scans in the morphometric evaluation of the lumbar intervertebral foramen. JMPT, May 1995, pp. 195-202.

Greenstein, J; Cramer, G.; Howe, J.; Glenn, W. 1992 Quantitative assessment of the lumbar intervertebral foramen by means of high and mid-field strength magnetic resonance images: Diagnostic and economic implications. Proceedings of the 1992 International Conference on Spinal Manipulation pp. 9-11

Cramer, G.; Cantu, J.; Greenstein, J.; Dorsett, R.; 1993 The accuracy of magnetic resonance imaging in determining the vertical dimensions of the cervical intervertebral foramina. Proceedings of the 1993 International Conference on Spinal Manipulation pp.38-42.

Cramer, G.; Howe, J.; Glenn, W.; Greenstein, J. 1994 Morphometric comparison of computed tomography to magnetic resonance imaging in the evaluation of the lumbar intervertebral foramina. Clinical Anatomy Volume 7, No. 4; pp. 173-180.

Greenstein, J 1995 Promoting high quality research, Dynamic Chiropractic, Volume 13, No. 14, pg. 15.

Greenstein, J 1996 Treatment and Rehabilitation of Multiple Overuse Injuries in an Elite Collegiate Male Fencer, DC Tracts; Volume 8, No. 2

Greenstein, J 1997 Chiropractic Enhancement of Sports Performance, Chapter 9; *Advances in Chiropractic*; Mosby-Year Book; Volume 4

Greenstein, J 1999 The Rationale for Chiropractic Utilization by Professional Athletes in the Workers' Compensation System, IAIABC Journal, Volume 36, No. 1; pp. 135-152

Greenstein, J, Kleiner D 2000 Guidelines for the Pre-Hospital Management of the Spine-Injured Athlete, Journal of Sports Chiropractic and Rehabilitation, Volume 14, No. 4; pp105-110

Cramer G, Cantu J, Greenstein J, Dorsett R, Gongaware K, Frank P, Skogsbergh D 2002 Oblique MRI of the Cervical Intervertebral Foramina: A Comparison of Three Techniques, Journal of the Neuromusculoskeletal System, Volume 10, No. 2; pp 41-51

Cramer GD, Cantu JA, Dorsett RD, Greenstein JS, McGregor M, Howe JE, Glenn WV. Dimensions of the lumbar intervertebral foramina as determined from the sagittal plane magnetic resonance imaging scans of 95 normal subjects. J Manipulative Physiol Ther. 2003 Mar-Apr;26(3):160-70.

Greenstein, J.S., Bishop, B.N., Edward, J.S., Topp, R. (2011) The Effects of a Closed-Chain, Eccentric Training Program on Hamstring Injuries of a Professional Football Cheerleading Team. Journal of Manipulative and Physiological Therapeutics, 34(3), 195-200.

Greenstein J; Building The Sports Chiropractic Practice – A Recipe for Success; *The American Chiropractor*; Volume 34, Number 1. pp 14-18

Bart Bishop, Jay Greenstein, Robert Topp Effects of Biofreeze vs. ice on acute, non-complicated neck pain; *Clinical Chiropractic (2011), Volume 14, Issue 4, December 2011, Pages 153-154* 

Jay Greenstein; Barton Bishop; Jean Edward; Allen Huffman; Danielle Davis; Robert Topp; The Effect of the Tri-Core<sup>®</sup> Cervical Pillow on Sleep Outcomes Among Whiplash Associated Disorder (WAD) Patients; *Topics in Integrative Health Care* 2012, Vol. 3(3) ID: 3.3004

Greenstein J, Bishop B, Edward J, Huffman A, Davis D, Topp R. Sleep Characteristics in Patients with Whiplash-Associated Disorders: A Descriptive Study. *Topics in Integrative Health Care*. 2012;3(4) ID: 3.4004.

Greenstein J, Bishop B, Etnoyer J, Topp R. Evaluation of Transcutaneous electrical nerve stimulation vs Biofreeze in the treatment of back pain [Abstract]. *The Journal of Chiropractic Education*. 2013;27(1):90.

Etnoyer JL, Greenstein J, Bishop B. FUNHAB<sup>®</sup>: A Science-based, Multimodal Approach for Musculoskeletal Conditions. *Topics in Integrative Health Care*. 2013;4(2) ID: 4.2002.

Etnoyer-Slaski JL, Greenstein J, Bishop BN, Topp R, Page P. Comparing Adhesion Over Five Days Between Three Brands of Elastic Therapeutic Tape. (Abstract). J Athl Train 51(6):S57-8.

# **LECTURES / INVITED PRESENTATIONS:**

Corwin J.; Greenstein J.; 1992 Diagnosis and Conservative Treatment of Sports Injuries. Proceedings of the Chiropractic Sports Symposium II. Mexico City, Mexico.

Corwin J.; Greenstein J.; 1993 Interactive Problem Based Learning for the Diagnosis and Management of Sports Injuries. Diplomate series, Northwestern College of Chiropractic, Los Angeles College of Chiropractic

Morphometry of the lumbar spine. International Academy on the Study of Low Back Pain. National College of Chiropractic, November 2-3, 1991.

Comparison of 1.5 and 0.35 Tesla magnetic resonance scans in the morphometric evaluation of the lumbar intervertebral foramen. Proceedings of the 1992 International Conference on Spinal Manipulation. Chicago, IL. May 1992

Preliminary descriptive analysis of triathlon injuries at the 1994 Ironman Triathlon World Championships: A race-day feasibility study. Chiropractic Grand Celebration of the Chiropractic Centennial Foundation, Washington, D.C., Thursday July 6, 1995.

Reliability of three orthopedic tests at the 1994 Ironman Triathlon World Championships: A prerace feasibility study. Chiropractic Grand Celebration of the Chiropractic Centennial Foundation, Washington, D.C., Friday July 7, 1995.

Standardized on the field evaluation and data collection procedures, featuring 10 minute comprehensive regional examinations. American Chiropractic Association Council on Sports Injuries and Physical Fitness' Ninth Annual Chiropractic Sports Science Symposium, July 20-23, 1995

A state of the art approach to conservative treatment and prevention of sports injuries in the adult population. DCAC, Washington DC Aerobics and Fitness Convention, July 28-30, 1995

Preliminary descriptive analysis of triathlon injuries at the 1994 Ironman Triathlon World Championships: A race-day feasibility study. Pre-Olympic Scientific Congress, Dallas, TX, Saturday July 13,1996.

Reliability of three orthopedic tests at the 1994 Ironman Triathlon World Championships: A prerace feasibility study. Pre-Olympic Scientific Congress, Dallas, TX, Saturday July 13, 1996.

The use of a patient satisfaction questionnaire at the 1995 Ironman World Championships: A descriptive pilot-study. Pre-Olympic Scientific Congress, Dallas, TX, Saturday July 13, 1996.

The use of a patient satisfaction questionnaire at the 1995 Ironman World Championships: A descriptive pilot-study. American Chiropractic Association Council on Sports Injuries and Physical Fitness' Tenth Annual Chiropractic Sports Science Symposium, July 15, 1996

Pain scale outcomes and patient satisfaction levels for conservative treatment of cervicogenic headache - a descriptive, pilot clinical trial. American Academy of Pain Management Annual Symposium, September 20, 1997

The role of the chiropractic sports physician. An expanding role with the N.F.L.P.A. National Football League Players Association Workman's Compensation Panel Meeting, April 17-19, 1998, Scottsdale, AZ.

Cervical Spine Injury Task Force Meeting. National Athletic Trainers Association, May 29-31, Indianapolis, IN.

The effect of training sessions on interobserver reliability at the 1996 Ironman World Championship Triathlon. International conference on Spinal Manipulation, July 15-19, 1998; Vancouver, British Columbia, Canada

Prevention of Work-Related Musculoskeletal Disorders. Worker's Memorial Day Union Conference, April 28th, 1999. Washington, DC.

Interdisciplinary Task Force Guidelines for on the Field Cervical Spine Injuries. Williamsburg, VA. May 23, 1999

The Rationale for Chiropractic Utilization by Professional Athletes in the Workers' Compensation System, International Association of Industrial Accident Boards and Commissions, Washington DC, September 27, 1999

Prevention of acute lower back pain in the workplace. Ergonomics Expo, Baltimore MD, May 1, 2000

Interdisciplinary Task Force Guidelines for on the Field Cervical Spine Injuries. Denver CO, VA. 3≜ugust 17, 2001 Treatment and Prevention of Sports Injuries. Strength Conference 2K2, Gaithersburg, MD. January 19, 2002

Chiropractic Management of Cervical Sports Injuries in Children: Special Considerations, World Federation of Chiropractic's 7<sup>th</sup> Biennial Congress; May 1, 2003

National Athletic Training Association's Inter-Association Task Force Guidelines for Helmet Removal Workshop, World Federation of Chiropractic's 7<sup>th</sup> Biennial Congress; May 2, 2003

Post Rehab Transition, Strength Conference 2004, College Park Maryland, Saturday April 3, 2004

Baseline Pre-Season Injury Survey of a National Football League Cheerleading Team, Federation for Chiropractic Education and Research Conference on Chiropractic Research, September 15-16<sup>th</sup>, 2006.

Patient Satisfaction Scores of 1550 Patients in Outpatient, Multi-center, Multidisciplinary Chiropractic and Physical Therapy Settings, Federation for Chiropractic Education and Research Conference on Chiropractic Research, September 15-16<sup>th</sup>, 2006.

Low Tech Rehab of the Elite Athlete; WFC Forum on Sports Chiropractic, Villamoura, Portugal, May 17-19, 2007

Poster Presentation: Baseline Pre-Season Injury Survey of a National Football League Cheerleading Team, ECU 75<sup>th</sup> Anniversary Convention and WFC Biannual Conference, Villamoura, Portugal, May 17-19, 2007

Poster Presentation: Patient Satisfaction Scores of 1550 Patients in Outpatient, Multi-center, Multidisciplinary Chiropractic and Physical Therapy Settings, Federation for Chiropractic Education and Research Conference on Chiropractic Research, Villamoura, Portugal, May 17-19, 2007

Poster Presentation: Baseline Pre-Season Injury Survey of a National Football League Cheerleading Team, American Chiropractic Association Council on Sports Injuries and Physical Fitness and American Chiropractic Association Council on Pediatrics Joint Sports & Pediatrics Symposium at the Nike World Campus, August 3-5, 2007.

Poster Presentation: Patient Satisfaction Scores of 1550 Patients in Outpatient, Multi-center, Multidisciplinary Chiropractic and Physical Therapy Settings, American Chiropractic Association Council on Sports Injuries and Physical Fitness and American Chiropractic Association Council on Pediatrics Joint Sports & Pediatrics Symposium at the Nike World Campus, August 3-5, 2007.

Turn-Key Steps to Implement Active Care in Your Practice; Chiropractic Economics Webinar; February 3, 2009

Poster Presentation: Anthropometrics, Common Diagnoses and Treatment Patterns for Current and Former Olympic Athletes Seeking Chiropractic Care at the World Olympians Association Reunion Center for the Beijing 2008 Olympics; Jay S. Greenstein, DC, CCSP - Chef Du Mission, International Sports Chiropractic Association, Beijing Olympic Games 2008; World Federation of Chiropractic International Conference on Chiropractic Research, April 30<sup>th</sup>-May 2, 2009, Montreal, Quebec, Canada

New Advances in Manual and Rehabilitative Techniques for Neuro-Musculo-Skeletal Conditions: Grand Rounds: St. Agnes Hospital, Baltimore, Maryland; May 27, 2009

Poster Presentation: Anonymous Patient Satisfaction Scores for Doctors of Chiropractic and Doctors of Physical Therapy at a Multi-location, Multi-specialty practice. Jay S. Greenstein, DC, CCSP; Barton N. Bishop, PT, DPT, CSCS, SCS – Sport and Spine Rehab Clinical Research Center; World Federation of Chiropractic International Conference on Chiropractic Research, April 30<sup>th</sup>-May 2, 2009, Montreal, Quebec, Canada

Effects of Kinesio<sup>®</sup> tape versus combined KT and Biofreeze<sup>®</sup> on treatment outcomes for musculoskeletal disorders: A Pilot Study; Dr. Jay Greenstein, DC, CCSP, Dr. Bart Bishop, PT, DPT, SCS, CSCS, Robert Topp, PhD; Thera-Band Research Academy Conference, July 24-27, 2009; Cancun, Mexico

Evidenced-based Chiropractic, A Review; Georgetown University Complimentary and Alternative Medicine Masters Program; September 24, 2009

Comprehensive Review of Low Tech Rehab Principles and Practice; Physician's Group Seminar; Tampa, Florida, July 10, 2010.

The Effects of a Closed-Chain, Eccentric Training Program on Hamstring Injuries of a Professional Football Cheerleading Team. Dr. Jay Greenstein, DC, CCSP, Dr. Bart Bishop, PT, DPT, SCS, CSCS, Robert Topp, PhD; Thera-Band Research Academy Conference, July 19-21, 2010; Athens, Greece

The Effects of a Closed-Chain, Eccentric Training Program on Hamstring Injuries of a Professional Football Cheerleading Team. FICS Symposium, Rio De Janeiro, Brazil April 5, 2011

Video Analysis of the Functional Movement Screen. FICS Symposium, Rio De Janeiro, Brazil April 5, 2011

Poster Presentation: The Short-Term Effects of Two Different Cyrotherapy Methods on Acute and Sub- Acute, Non-Complicated, Bilateral Neck Pain. World Federation of Chiropractic 3§ymposium, Rio De Janeiro, Brazil April 6-9, 2011 Poster Presentation: The Effects of a Closed-Chain, Eccentric Training Program on Hamstring Injuries of a Professional Football Cheerleading Team. World Federation of Chiropractic Symposium, Rio De Janeiro, Brazil April 6-9, 2011

Low Tech Functional Rehab. Michigan Association of Chiropractors Spring Convention. Traverse City, Michigan. April 27-29, 2012

Low Tech Functional Rehab. Cleveland College of Chiropractic Homecoming. Overland Park, Kansas. October 12-14, 2012

Poster Presentation: Greenstein J, Bishop B, Etnoyer J, Topp R. Evaluation of Transcutaneous electrical nerve stimulation vs Biofreeze in the treatment of back pain. Association of Chiropractic Colleges Research Agenda Conference. Washington, DC. March 14-17, 2013

EMG activation of gluteal musculature during therapeutic exercises with and without Thera-Band<sup>®</sup> resistance; Bishop, B. Etnoyer, J. Greenstein, J. World Federation of Chiropractic Conference. Durban South Africa, April 18, 2013

How to Create Raving Fan Patients; Functional Rehab for Injury Treatment and Performance Enhancement; Build Your Clinical Confidence for Success; Technology Infrastructure for Practice Explosion; Florida Chiropractic Association. Orlando Florida, August 22-25, 2013

Hot Topics in Chiropractic; Congress on Chiropractic State Association. Seattle, Washington, November 7-10, 2013

Towards Injury Prevention in Sport Train the Trainers Program; Foundation for Chiropractic Progress Seminar. Las Vegas, Nevada, January 8, 2014

Towards Injury Prevention in Sport ; Parker Seminars. January 9, 2014

Webinar: Sponsored by ChiroCode. January 30, 2014 "Healthcare Reform and How to Stake Your Claim."

Webinar: Sponsored by ChiroCode. February 13, 2014 "The Use of Clinical Guidelines to Fight Insurance Company Abuse"

Webinar Series: Sponsored by ChiroHealthUSA. February 4, 2014 Part I: "Growing Your Practice through the Entrepreneurial Operating System (EOS)<sup>®</sup>" Hot Topics in Healthcare for the 21st Century – Stake Your Claim! Washington State Chiropractic Association, Seattle WA February 8, 2014

Webinar Series: Sponsored by ChiroHealthUSA. March 11, 2014

Part II: "Growing Your Practice through the Entrepreneurial Operating System (EOS)  $\ensuremath{^\circ}$  - Vision Building"

Webinar: Sponsored by ChiroCode. March 13, 2014 "How to Create Raving Fan Patients"

Webinar Series: Sponsored by ChiroHealthUSA. April 15, 2014 Part III: "Growing Your Practice through the Entrepreneurial Operating System (EOS)<sup>®</sup> -Vision Building II"

POWERPlay in Sports; Illinois Chiropractic Society, May 22, 2014

Webinar Series: Sponsored by ChiroHealthUSA. May 20, 2014 Part IV: "Growing Your Practice through the Entrepreneurial Operating System (EOS)<sup>®</sup>: Right People, Right Seat"

Webinar Series: Sponsored by ChiroHealthUSA. June 17, 2014 Part V: "Growing Your Practice through the Entrepreneurial Operating System (EOS)<sup>®</sup>: Building Your Data"

POWERPlay in Sports Illinois Chiropractic Society, June 28, 2014;

Webinar Series: Sponsored by ChiroHealthUSA. July 15, 2014 Part V: "Growing Your Practice through the Entrepreneurial Operating System (EOS)<sup>®</sup>: Strengthening Process"

- Webinar Series: Sponsored by ChiroHealthUSA. August 19, 2014 Part IV: "Growing Your Practice through the Entrepreneurial Operating System (EOS)<sup>®</sup>: Overcoming Issues"
- Webinar Series: Sponsored by ChiroHealthUSA. September 16, 2014 Part IV: "Growing Your Practice through the Entrepreneurial Operating System (EOS)<sup>®</sup>: Creating Practice Traction"

EMG Activation of Cervical Musculature during Therapeutic Exercise with Thera-Band<sup>®</sup> Resistance versus Manual Resistance, Theraband Research Advisory Committee meeting, Park City UT, August 6-8, 2014

Effectiveness of Biofreeze<sup>®</sup> on shoulder pain and in-office exercise performance: A preliminary pilot study, , Theraband Research Advisory Committee meeting, Park City UT, August 6-8, 2014

Healthcare Reform: How To Stake Your Claim and Thrive in a Sea of Change, Florida Chiropractic Association, National Conference, August 21-24, 2014

Ah-Hah! Moments that Propelled Clinical Success, Plenary Session, Florida Chiropractic Association, National Conference, August 21-24, 2014

Bishop BN, Greenstein J, Etnoyer-Slaski JL, Topp R, Page P. Comparing Adhesion over Five Days between Three Brands of Elastic Therapeutic Tape. Poster Presentation at: Parker Seminars; January 14-16, 2016; Las Vegas, NV.

Greenstein J Bishop BN, Etnoyer-Slaski JL, Topp R. Effectiveness of Biofreeze<sup>®</sup> on shoulder pain and in-office exercise performance: A preliminary pilot study. Poster Presentation at: Parker Seminars; January 14-16, 2016; Las Vegas, NV.

Greenstein J Bishop BN, Etnoyer-Slaski JL, Topp R. EMG Activation of Cervical Musculature during Therapeutic Exercise with Thera-Band<sup>®</sup> Resistance versus Manual Resistance in Neck Pain Population. Poster Presentation at: Parker Seminars; January 14-16, 2016; Las Vegas, NV.

Bishop B, Greenstein J,Etnoyer-Slaski J, Topp R. Comparing Adhesion over Five Days Between Three Brands of Elastic Therapeutic Tape. 2016 National Athletic Trainers' Association Annual Meeting and Symposium, Thematic Poster Presentation. Baltimore, MD. Journal of Athletic Training. ID#16015SOTE

Greenstein J, Etnoyer-Slaski JL, Topp R, McNulty J. Step 1 in the validation of a novel technology algorithm's ability to produce likely low back and neck pain conditions. World Federation of Chiropractic Biennial Congress, Poster Presentation, Munich, Germany, 2019.

Greenstein J, Etnoyer-Slaski J, Bishop BN, Topp R. Immediate and short-term effect of Biofreeze® versus Placebo on acute neck pain and disability. 2019 Association of Chiropractic Colleges Research Agenda Conference (ACC-RAC), Platform Presentation. Baltimore, MD. Journal of Chiropractic Education. 2019;

Greenstein J, Etnoyer-Slaski J, Topp R, McNulty J. Step 1 in the validation of a novel technology algorithm's ability to produce likely low back and neck pain conditions. 2019 Association of Chiropractic Colleges Research Agenda Conference (ACC-RAC), Platform Presentation. Baltimore, MD. Journal of Chiropractic Education. 2019;

Etnoyer-Slaski J, Topp R. The effect of Theraworx Relief on night-time leg cramps and associated symptoms. 2019 Association of Chiropractic Colleges Research Agenda Conference (ACC-RAC), Platform Presentation. Baltimore, MD. Journal of Chiropractic Education. 2019;

Bishop BN, Greenstein J, Etnoyer-Slaski J, Topp R. Effect of Biofreeze<sup>®</sup>, TheraBand<sup>®</sup> Kinesiology Tape, or the combination of products on acute low back pain and disability. 2019 Association of Chiropractic Colleges Research Agenda Conference (ACC-RAC), Platform Presentation. Baltimore, MD. Journal of Chiropractic Education. 2019;

Topp, R., Slaski, J., Bishop, B., Greenstein, J. & Hieronimus, G., Implanting Allogenic Cytokines (HAM) and Mesenchymal Stem Cells (HUMCWJ) reduces pain and improves functioning among knee osteoarthritis (OA) patients who are candidates for total knee arthroplasty (TKA). Midwest Nursing Research Society 44th Annual Research Conference, Schaumburg, IL. April 1-4, 2020.

Greenstein, J. Topp, R., Etnoyer-Slaski, J., Staelgraeve, M., & McNulty, J., (2021) The effect of a mobile health app on adherence to physical health treatment: Retrospective analysis. JMIR Rehabilitation and Assistive Technologies, 8(4):e31213 URL: https://rehab.jmir.org/2021/4/e31213 DOI: 10.2196/31213.

#### VARIOUS LECTURE TOPICS AND PARTICIPANTS:

# Treatment and Prevention of Musculoskeletal Injuries and Proper Stretching Workshop

United States Department of Archives, George Washington University Family Practice, Army Corp of Engineers, MAMSI Health Insurance, United States General Services Administration, United States Department of Education, Small Business Administration, Nuclear Regulatory Commission, United States Department of Agriculture, National Institute of Standards and Technology, United States Census Bureau, Library of Congress, Capital Office Park, Housing and Urban Development, National Gallery of Art, St. Jude's Runners, Greenbelt Fire Department, United States General Accounting Office, Leukemia Society Team in Training, Prince George's Sports and Learning Complex, St. Jude's Runners, Montgomery County Road Runners, National Education Association, National Labor Relations Board, Metro Run and Walk, Potomac Valley Bank ,Leukemia Society Team in Training, National Education Association, Central High School

#### **Ergonomics in the Workplace Lecture/ Deskercise**

United States Department of Education, City of Rockville Wellness Office, Army Corp of Engineers, Comcast, Asbury Methodist Village, National Labor Relations Board, Encore Marketing, Latham and Watkins, NASA Goddard Space Center, Loudon County Government

#### **Carpal Tunnel Syndrome Lecture**

Army Corp of Engineers, Dept. of Housing and Urban Development, Capital Office Park, Small Business Administration, NASA Goddard Space Center

# Stress Management Lecture

World Bank, Rosecroft Raceway, Lanham Rotary Club, Army Corp of Engineers, Celera Genomics, Potomac Valley Bank, United States Department of Education Switzer Building, Greenbelt Middle School, Montgomery County Health and Human Services, Montgomery County Council Office Building, Defense Information Systems Agency, Tycon Office Park, The United States Senate

# **EVENTS CHIROPRACTOR:**

1993 U.S. Powerlifiting Federation Regional Championships. Baltimore, Maryland. August 29, 1993

1994 Rollerhockey Championships Event. College Park, MD. June 18, 1994 1994 Jesus Christ Superstar, The Warner Theatre, Washington D.C., October 6, 1994

1994 Gatorade Ironman Triathalon World Championships, Kailua-Kona, Hawaii, October 15, 1994; Director of two part feasability study.

1995 IVEB Professional Volleyball Tournament, Ocean City, MD; June 10-11, 1995

1995 Maryland State Championships, IVEB Professional Volleyball Tournament, Ocean City, MD; August 5-6, 1995

1995 SportsFocus Magazine Biathlon, Germantown, MD; September 17, 1995

1995 Gatorade Ironman Triathalon World Championships, Kailua-Kona, Hawaii, October 8, 1995; Director of three part clinical study.

1996 United States Olympic Beach Volleyball Trials, Baltimore, MD, June 4, 1996 and June 8, 1996;

1996 IVEB Professional Volleyball Tournament, Ocean City, MD; June 21-22, 1996

1996 Maryland State Championships, IVEB Professional Volleyball Ocean City, MD; August 3-4, 1996

1996 Achilles 5K run, Aspen Hill, MD; September 21, 1996

1997 Maryland State Junior Tae Kwan Doe Championships; Essex, MD; May 10, 1997

1998 International Powerlifting Association State Championships, Annapolis, MD October 31, 1998

1999 Tae Kwon Doe U.S. National Championships, Daytona Beach FL, April 9-11, 1999

1999 Maryland State Junior Tae Kwan Doe Championships; Essex, MD; May 1, 1999
1999 US Junior Olympics, Tae Kwon Doe; Las Vegas, NV; July16-17, 1999
2000 National Rookie League Washington DC franchise tryouts. April 29, 2000
2007 Avon Walk for Breast Cancer, May 6<sup>th</sup> 2007
2007 Gibran Hamdan Football Skills Camp July 2007
2008 Beijing Olympics, World Olympians Association Reunion Center, August 2008
2009 Capitol Movement Project Performance, March 2009
2010 Capitol Movement Project Performance, March 2010
2011 Capitol Movement Project Performance, May 2011
2012 Capital Movement Project Performance, April 2012
2018 Official Chiropractor, Washington Valor, Arena Football League