



CALIFORNIA  
AMBULANCE  
ASSOCIATION

# 74<sup>TH</sup> Annual Convention

**SEPTEMBER 13-16, 2022**



## WESTIN

ANAHEIM RESORT



## Registration Brochure



# 74<sup>TH</sup> Annual Convention

The California Ambulance Association cordially invites California's EMS leaders and professionals to join us at the Annual Convention on September 13-16, 2022 at the Westin Anaheim.

This year's program will feature three tracks (Executive, Operations and Reimbursement) of outstanding speakers and topics, including state-specific issues that will help your ambulance service thrive in the changing EMS environment. Please see pages 3-7 in this brochure for a complete schedule and description of all sessions. Please complete the registration form included with this brochure to sign-up to attend today!

Please pass this convention brochure and registration information along to your colleagues and personnel.

## DATES TO REMEMBER

### HOTEL RESERVATION DEADLINE:

**August 12, 2022**

Call (800) 427-7247 to make your hotel reservation.

### EARLY RESERVATION DEADLINE:

**August 12, 2022**

Call the CAA toll-free at 877.264.9786

### PLEASE NOTE:

Presenters and topics are subject to change. Presentations and materials provided by speakers at CAA events are not reviewed by CAA for accuracy and are the sole opinion and advice of that speaker/presenter.

## GENERAL INFORMATION

### WESTIN ANAHEIM

1030 W. Katella Avenue  
Anaheim, CA 92802

### GENERAL INFORMATION

A haven of wellness and renewal, The Westin Anaheim Resort is a brand new AAA Four-Diamond property across from Disneyland® Resort. Find a restorative respite in beautifully designed hotel accommodations with signature amenities and Westin Heavenly® Beds. Delight your palate with diverse dining options, including a steakhouse, Mexican restaurant and rooftop bar with amazing panoramic views of Disney's fireworks.

### HOTEL RESERVATIONS

For guest room reservations, please call (877) 264-9786. The CAA rates are: \$269.00 plus tax per night. The deadline to make your hotel reservation is August 12, 2022.

### TRANSPORTATION

Self parking is available for \$35 per day. Valet parking is available for \$39 per day. An electric car charging station is available. The hotel is located about 12 miles from John Wayne Airport (SNA).

### PHOTO/VIDEO DISCLAIMER

By registering for and attending this conference, you agree that your image may be taken during the conference and used at any time, without further notification, for printed materials, websites, social media and other marketing purposes.

### CONVENTION CANCELLATION POLICY

A full refund of convention registration fees shall be made if registration is cancelled in writing by August 29, 2022. If registration is cancelled after August 29, 2022, a 50% cancellation fee will apply. Golf fees are non-refundable if cancelled after August 29, 2022. No refunds or credits will be made for "no shows."

## FEATURED SPEAKERS

### L. DAVID MARQUET, *Keynote Speaker*



Student of leadership and organizational design, former nuclear submarine Commander, and named on one of the Top 100 Leadership speakers by Inc. Magazine. David is the Author of the Amazon #1 Best Seller: Turn the Ship Around!, and The Turn the Ship Around Workbook. David's latest book, Leadership is Language, was released February 4th, 2020. David Marquet imagines a work place where everyone engages and contributes to their full intellectual capacity, a place

where people are healthier and happier because they have more control over their work - a place where everyone is a leader.



**ED NORWOOD – ERN**  
The National Council  
of Reimbursement  
Advocacy



**ASBEL MONTES**  
Solutions Group



**SCOTT MOORE**  
Moore EMS Consulting



**DONNA HANKINS**  
American Ambulance



**MATT ZAVADSKY**  
MedStar Mobile  
Healthcare



**DOUG WOLFBERG**  
Page, Wolfberg &  
Wirth

## PRE CONFERENCE RECEPTION

**TUESDAY, SEPTEMBER 13, 2022 AT 6PM**



### **RISE ROOFTOP** **WESTIN ANAHEIM RESORT**

**1030 W. Katella Ave.  
Anaheim, CA 92802**

Join us for a pre conference reception on Tuesday evening from 6pm - 8pm on the Westin Anaheim's RISE Rooftop lounge. The rooftop lounge was awarded OpenTable 2022 Diners' Choice and features direct views into Disney's California Adventure Park. Separate registration required.

## **RAYMOND LIM JIM McNEAL MEMORIAL GOLF TOURNAMENT**

**TUESDAY, SEPTEMBER 13, 2022**  
**TEE TIMES START AT 10:00 AM**  
**ANAHEIM HILLS GOLF COURSE**

**6501 Nohl Ranch Road**  
**Anaheim, CA 92807**  
**(714) 998-3041**

In honor of the CAA's great friends and colleagues, Raymond Lim and Jim McNeal, Jr., a golf tournament will be held at the beautiful Anaheim Hills Golf Course. The golf registration fee includes green and cart fees, tee prizes, lunch and one beverage ticket. Please send in your registration form indicating participation in the tournament as soon as possible. Golf fees are not refundable if cancelled after August 29, 2022.



# SCHEDULE OF EVENTS

## TUESDAY, SEPTEMBER 13, 2022

**12:00 pm – 4:00 pm** – *Anabella Foyer*  
**Registration Open**

**10:00 am – 5:00 pm** – *Anaheim Hills Golf Course*  
**Golf Tournament**  
Staggered Start, lunch provided. Separate registration required.

**10:00 am – 12:00 pm** – *Anabella C*  
**Los Angeles County Ambulance Association Meeting**

**12:00 pm – 4:00 pm** – *Anabella B*  
**Exhibitor Set-up**

**6:00 pm – 8:00 pm** – *RISE Rooftop*  
**Pre Conference Reception**  
Separate registration required.

## WEDNESDAY, SEPTEMBER 14, 2022

**6:30 am – 7:30 am** – *Anabella B*  
**Exhibitor Set-Up**

**7:30 am – 5:00 pm** – *Anabella Foyer*  
**Registration Open**

**7:30 am – 5:00 pm** – *Anabella B*  
**CAA Marketplace Open**

**7:30 am – 8:15 am** – *Anabella B*  
**Continental Breakfast**

**8:00 am – 10:00 am** – *Anabella A*  
**GENERAL SESSION:**

**Welcome & Keynote Address: Turn the Ship Around! Creating Leaders at Every Level™**

*L. David Marquet, Keynote Speaker*

David Marquet delivers a powerful Intent-Based Leadership message that leadership is not for the select few at the top; in highly effective organizations, there are leaders at every level. This method of leadership is based on empowerment, not ego, not personality. Join us as we hear David tell the story of breaking molds, and how this transformed his command.

**10:05 am – 10:55 am** – *Doria*

**EXECUTIVE SESSION:**

**EMS Strategies for Reducing APOT Delays**

*Doug Wolfberg, Page, Wolfberg & Wirth*

Perhaps nowhere in the United States is the issue of hospital delays more acute



# SCHEDULE OF EVENTS

## WEDNESDAY, SEPTEMBER 14, 2022 (continued)

– and more costly – than in California. In this critical session, EMS attorney and national EMS leader Doug Wolfberg – co-author of the acclaimed Ambulances Held Hostage series on the APOT issue – will illuminate key strategies that EMS agencies can take to confront the offload delay issue. This session will include both strategies for EMS-hospital collaboration, and, if that fails, strategies that EMS can implement unilaterally to address this intractable problem. This session will also address strategies for working with your Local EMS Agency and other stakeholders on reducing your hospital offload delays.

**10:05 am – 10:55 am** – *Gloriana A/B*

### **REIMBURSEMENT SESSION:**

#### **Billing Survival Strategies for Medicare Managed Care**

*Maggie Adams - EMS Financial Services, Inc.*

Reports indicate that Medicare Advantage membership and Medicaid managed care continue to grow. It was announced in April that over 46% of Medicare beneficiaries are enrolled in commercial plans. Their unique documentation and billing requirements frustrate providers from how to submit claims successfully to what to do to navigate denials and appeals. This session will discuss the how-to's of required documentation, good billing processes, and follow-up for these important payers to protect compliance and revenue.

**10:05 am – 10:55 am** – *Gloriana C*

### **OPERATIONS SESSION:**

#### **Public Relations in EMS: Enhancing and Protecting Your Brand**

*Brian Lochrie - Communications LAB*

*Diana Moreno - Communications LAB*

What kind of impression do your community, your partners, and your employees have of your organization? In this presentation we will talk about the importance of PR and how having a foundational approach will help you effectively communicate, engage, and build relationships with your audience to develop a positive public perception. We will also give you some tips to strengthen your PR approach by developing content for social media platforms that are at the forefront of today's methods for sharing information.

**10:55 am – 11:15 am** – *Anabella B*

#### **Break in the CAA Marketplace**

**11:15 am – 12:10 pm** – *Anabella A*

### **GENERAL SESSION:**

#### **A Gathering of Legals**

*Doug Wolfberg, Page, Wolfberg & Wirth*

*Amber Healy, Atkinson, Andelson, Loya, Ruud & Romo*

*Matthew R. Streger, Esq. - Keavney & Streger, LLC*

*Scott Moore - Moore EMS Consulting, LLC*

*Moderated by Rob Lawrence*

In every element of EMS practice we are never far away from law and lawyers. From HR practices to litigation and reimbursement, cost collection and regulation we usually need a legal opinion and interpretation. We have invited many of our leading legal minds to opine (and possibly agree!) on the leading issues of the day. Executive Director, Rob Lawrence will facilitate this interactive session with top JDs, featuring Doug Wolfberg, Amber Healy, Matt Streger and Scott Moore.

# SCHEDULE OF EVENTS

## WEDNESDAY, SEPTEMBER 14, 2022 (continued)

**12:10 pm – 1:25 pm** – *Anabella C/D*  
**Luncheon**

**1:30 pm – 2:20 pm** – *Doria*  
**EXECUTIVE SESSION:**

**Wait... Don't Leave! Employee Bonuses and Other Retention Strategies**  
*Amber Healy, Esq. - Atkinson, Andelson, Loya, Ruud & Romo*

In today's competitive marketplace, attracting and retaining skilled employees is extremely challenging. Competitors are utilizing creative strategies in their efforts to lure away talent and it is forcing employers to develop innovative retention strategies in order to hang on to their skilled workforce. Join Amber Healy, a partner with Atkinson, Andelson, Loya, Ruud & Romo, as she discusses the legal risks you may not be aware of when providing employee bonuses and implementing other retention strategies.

**1:30 pm – 2:20 pm** – *Gloriana A/B*  
**REIMBURSEMENT SESSION:**

**Five Things ERISA Payors Don't Want You To Know**  
*Ed Norwood, ERN - The National Council of Reimbursement Advocacy*

We are in a war. A war to preserve patient access to care. A war to advocate for medical appropriate healthcare for patients. So if you are having difficulty getting government claims paid, more than likely you are fighting with the wrong weapons. In this session, participants will learn how to challenge staff tactics and unnecessary requests for information inconsistent with the Summary Plan Description (SPD); How to challenge medical necessity denials; How to fight ERISA plans who fail to respond timely to authorization requests; Laws that give you the right to appeal as an authorized representative of the patient; Federal timeframes for ERISA emergency reimbursement and appeals and MORE!

**1:30 pm – 2:20 pm** – *Gloriana C*  
**OPERATIONS SESSION:**

**EMS Transformation Update - What's Promising? What's Threatening?**  
*Matt Zavadsky - MedStar Mobile Healthcare*

The role of EMS continues to dramatically evolve. Agencies and practitioners are implementing new services that enhance the value EMS bring to patients, payers, hospitals, home care and hospice agencies. This session will provide an overview of the programs implemented over the past year and the ways they are generating value to their key stakeholders. Learning Objectives: Understand the ways the role of EMS continues to evolve; Learn 5 new programs that have been implemented over the past year; Understand the ways value is being determined for these new programs; Learn how to partner with others to change the environment to facilitate transformation.

# SCHEDULE OF EVENTS

## WEDNESDAY, SEPTEMBER 14, 2022 (continued)

**2:20 pm – 2:45 pm** – Anabella B

### **Break in the CAA Marketplace**

**2:45 pm – 3:55 pm** – Anabella A

#### **GENERAL SESSION:**

##### **Building Trust Through Alignment**

*Shelly Hudelson - NAGE*

*Phil Petit - NAGE*

*Lee Almeida - TEMSA*

*Jason Brollini - AFSCME*

This session will explore how the CAA collaborated with labor partners on a common goal and objective and what that means for the road forward. Panelists will also share their perspective of how and where to make improvements in working conditions and how that can enhance recruitment and retention efforts.

**4:00 pm – 5:30 pm** – Gloriana A/B

#### **REIMBURSEMENT SESSION:**

##### **Wine and Whine - A Discussion of Current Billing Challenges Over Wine**

*Maggie Adams - EMS Financial Services, Inc.*

*Donna Hankins - American Ambulance*

*Melissa Harris - Ambuserve, Inc.*

*Asbel Montes - Solutions Group*

*Ed Norwood, ERN - The National Council of Reimbursement Advocacy*

*Doug Wolfberg, Esq. - Page, Wolfberg & Wirth*

Let's end Reimbursement Day 1 on a high note. Join our reimbursement specialists for wine and a discussion of the hot topics in California ambulance reimbursement. Don't miss this opportunity to talk about the billing issues with other billing office staff. We'll bring the wine, you bring the questions for our expert panelists.

**4:00 pm – 5:30 pm** – Gloriana C

#### **EXECUTIVE/OPERATIONS SESSION:**

##### **Wine and Whine - PAGA Claims**

*Corey Cabral, Esq. - CDF Labor Law*

*Amber Healy, Esq. - Atkinson, Andelson, Loya, Ruud & Romo*

EMS employers are not immune to the outbreak of wage and hour and PAGA claims plaguing California businesses. Healthcare is one of the largest and fastest-growing industries in the country, placing a bullseye on employers in this sector. Attendees will be provided with an analysis of wage and hour issues impacting ambulance companies, best practices to avoid these types of claims, and strategies for defending them. Attendees will also have the opportunity to ask questions of our panelists so come prepared with your questions and we'll provide the wine!

**5:30 pm – 7:00 pm** – Anabella B

### **President's Reception**



# SCHEDULE OF EVENTS

## THURSDAY, SEPTEMBER 15, 2022

**8:00 am – 4:00 pm** – Anabella Foyer  
**Registration**

**8:00 am – 8:30 am** – Anabella B  
**Continental Breakfast**

**8:30 am – 9:45 am** – Anabella A  
**GENERAL SESSION:**

**Lessons on Life and EMS, from the House of the Mouse**

*Matt Zavadsky - MedStar Mobile Healthcare*

*Steve Grau - Royal Ambulance*

The magic of Disney is experienced differently as an adult compared to a child. There are key things that Disney does exceptionally well that creates magical experiences for their guests, both young and old. Disney's culture and approach to the guest experience contain important lessons for EMS agencies, our leaders and our providers. This insightful and humorous session will walk participants through the Matt's recent experience at Walt Disney World, illustrate how the 'Disney Factor' can and should be applied to EMS. Steve will explain how he applied concepts he learned as a participant in the Disney Institute to his agency, and the results from these applications.

**9:45 am – 10:15 am** – Anabella B  
**CAA Marketplace Open**

**10:15 am – 11:05 am** – Doria  
**EXECUTIVE SESSION:**

**Bad Bosses**

*Matthew R. Streger, Esq. - Keavney & Streger, LLC*

Have you ever had that boss that you just could not stand? Maybe they were a micromanager, or a blame thrower, or they were threatened by you. How do you handle working for someone who makes you work, or your life, difficult? Let's examine some of the common types of bad bosses, why the behavior is bad, what you should do with the boss, and how to identify if actually you are the bad boss and how to handle that!

**10:15 am – 11:05 am** – Gloriana A/B  
**REIMBURSEMENT SESSION:**

**What is your data telling you?**

*Asbel Montes, Solutions Group Consulting*

Discover the power of using your data to reveal changing reimbursement trends.

**10:15 am – 11:05 am** – Gloriana C  
**OPERATIONS SESSION:**

**Legal Case Studies: 4 Key EMS Court Cases and Lessons Learned for Your Operations**

*Doug Wolfberg, Page, Wolfberg & Wirth*

Actual EMS law court cases are always interesting – and lively – ways to learn critical lessons from the mistakes of others. In this insightful session, national EMS attorney Doug Wolfberg will present four EMS legal cases that directly impact EMS operational issues. More importantly, this session will take the lessons of those cases and help you apply them to your agency's operations to help you avoid falling into the same legal traps that befell those agencies.



# SCHEDULE OF EVENTS

## THURSDAY, SEPTEMBER 15, 2022 (continued)

**11:10 am – 12:15 pm** – Anabella A

**GENERAL SESSION:**

**CAA State of the Union/CAASE Awards Presentations**

*Moderated by James Pierson - Medic Ambulance Service*

Attend this session to hear an overview of CAA activities over the last year and hear presentations from CAASE awards finalists.

**12:15 pm - 1:15 pm** – Anabella C/D

**Lunch and CAASE Awards**

**1:20 pm – 2:10 pm** – Doria

**EXECUTIVE SESSION:**

**Wellness - A Conversation That Matters**

*Mike Taigman, FirstWatch*

Mike Taigman hosts a monthly webinar series, a Conversation That Matters (CTM), in which expert panelists are combined with the audience to discuss a topic and jointly create a solution. For this session, Mike will run his CTM to a live audience assisted by his usual co-host, our own Rob Lawrence. In the current era of EMS delivery, hardship and adversity have been ever present. Mike will use his decades of experience to highlight issues and discuss positive directions of travel.

**1:20 pm – 2:10 pm** – Gloriana A/B

**REIMBURSEMENT SESSION:**

**California Balance Billing**

*Donna Hankins, American Ambulance*

Join Payer Issues Chairperson Donna Hankins to review the current (and forecast the future) state and federal regulations in place related to “commercial balance billing,” defined as commercial insurance underpayments that result in balance billing the patient for an amount over the stated copay and deductible provided to the patient by the insurance. Included are tools to help identify underpayments and actionable steps to help providers obtain reimbursement when a commercial insurance underpays a claim.

**1:20 pm – 2:10 pm** – Gloriana C

**OPERATIONS SESSION:**

**Deployment Dilema - Is it time to ditch single tier, all ALS EMS deployment?**

*Matt Zavadsky - MedStar Mobile Healthcare*

Many EMS systems response ALS ambulances to every 9-1-1 emergency. The basis for this system design has been both clinical and financial. But, are all ALS systems actually harming patients, while making it more difficult to meet rising call volume demands with a shrinking workforce? This dynamic, and at times controversial session will explore the pros and cons of ditching an all ALS single tier EMS system response model. Learning Objectives: Understand the historical reasons for an all ALS deployment model; Learn the current research on the impact of ALS on patient outcomes; Learn examples of highly respected EMS systems that use a tiered deployment model; Learn ways to implement change in your system.

**2:10 pm - 2:40 pm** – Anabella B

**Break in the CAA Marketplace / Vendor Raffle**

# SCHEDULE OF EVENTS

## THURSDAY, SEPTEMBER 15, 2022 (continued)

**2:45 pm – 4:00 pm** – Anabella A

**GENERAL SESSION:**

**EMS on Fire**

*Scott Clough - AP Triton*

*William L. "Bill" Adams - Johnston & Thomas*

*James Pierson - Medic Ambulance*

This session will review some models of public – private partnerships currently being done in California. How do partnerships work? How long have these partnerships been around? How can they provide services in our communities? Panelists include Scott Clough, a partner with AP Triton Consulting, LLC, a nationwide emergency medical services consulting firm which specializes in maximizing revenue to states, counties, cities, and districts through their delivery of pre-hospital emergency medical services; William L. "Bill" Adams, with Johnston and Thomas which serves as counsel for Sonoma County Fire District and James Pierson, President and COO of Medic Ambulance and current CAA President.

**4:00 pm - 4:30 pm** – Anabella A

**Closing Remarks & CAAPAC Raffle**

**5:00 pm - 6:00 pm** – Delicia

**Southern CA Ambulance Associations Meeting with CAA Board of Directors**

**6:00 pm - 8:00 pm** – Delicia

**CAA Board of Directors Meeting**

## FRIDAY, SEPTEMBER 16, 2022

### FRIDAY MEETINGS HAVE BEEN CANCELLED



# 74<sup>TH</sup> Annual Convention

## IMPORTANT, PLEASE READ!

Full registration features admission to all events on Wednesday, September 14<sup>th</sup> & Thursday, September 15<sup>th</sup> including seminars, all refreshments, CAA Marketplace, Wednesday Lunch, President's Reception and Thursday Lunch. Full registration does not include the golf tournament or Tuesday evening reception.

You can register online by visiting [www.the-cao.org](http://www.the-cao.org)

Company Name: \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Contact: \_\_\_\_\_ Signature: \_\_\_\_\_

Attendee Names & E-mail Addresses: \_\_\_\_\_

REGISTRATION OPTIONS:	QTY / MEMBER PRICE	NON-MEMBER PRICE	TOTAL
Early Full Registration (Before 8/15/22)	____ @ \$600	\$725	_____
Late Full Registration	____ @ \$625	\$750	_____
Golf Tournament	____ @ \$125	\$175	_____
Pre Conference Reception (Tuesday)	____ @ \$ 65	\$ 75	_____
<b>Guest Tickets</b>			
Golf Tournament	____ @ \$125	\$175	_____
Pre Conference Reception (Tuesday)	____ @ \$ 65	\$ 75	_____
Wednesday Lunch	____ @ \$ 75	\$ 85	_____
President's Reception (Wednesday)	____ @ \$ 65	\$ 75	_____
Thursday Lunch	____ @ \$ 75	\$ 85	_____
CAAPAC Raffle Tickets	_____ 1 for \$ 25 / 5 for \$ 99		_____

TOTAL REGISTRATION FEES = \_\_\_\_\_

### METHOD OF PAYMENT:

- Check Payable to California Ambulance Association     MasterCard     Visa     American Express

**Please fax credit card payments; do not email!**

Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ CID #: \_\_\_\_\_

Billing Address: \_\_\_\_\_

Name on card: \_\_\_\_\_ Signature: \_\_\_\_\_

PLEASE COMPLETE AND RETURN TO:

## California Ambulance Association

2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833

Toll Free: (877) 276-1410 • Fax: (916) 924-7323 • [www.the-cao.org](http://www.the-cao.org)