

NOTE: This schedule will be modified in December with the addition of social/networking information, announcements, etc.

FRIDAY, FEBRUARY 12, 2021 – Pre Virtual Winter Meeting Special Session

10:00 – 11:00 AM

William McKendree, Pennsylvania Healthcare Benefit Support
“What Mama Didn’t Tell You About Medicare”

It might appear to be straightforward – it was supposed to be that way when it was imagined in the 1960s, but the Medicare system of delivering health care coverage for over 50 million people has evolved into a confusing, frustrating and worrisome thing that has led many to sing the blues in the night. How to use the Medicare system effectively is an essential part of transition planning – what options are available, how to access them and how to evaluate which options will work best. We will look at the rules governing enrollment into Medicare (and how the enrollment process has broken down in the “Time of Pandemic”); the various components of the Medicare system and how they coordinate with each other (and with health coverage components outside the Medicare system); and how to use these components to create an effective individual coverage strategy.



FRIDAY, FEBRUARY 26, 2021

9:00 – 10:00 am - SESSION #1

James Lange, Lange Financial Group & Matthew Schwartz, Lange Legal Group, LLC

“Attorney’s Guide to Beating the New Death Tax: How to Stop the IRS from Taking Up to one-third of Your and Your Client’s IRAs and Retirement Plans after the SECURE Act.” (Includes 2-page outline)

10:15 – 11:30 am SESSION #1 Continued

James Lange, Lange Financial Group & Matthew Schwartz, Lange Legal Group

11:30 am – 12:25 pm

Break

12:25 - 12:45 pm - SESSION #2

Joe Uliana, J.M. Uliana Associates

“State Legislative Updates & Issues”

Former state Senator Uliana will provide a state legislative update, focusing on how the new Pennsylvania General Assembly will address legislation on issues of importance to PAELA members such as:

- *Remote notarization*
- *Pennsylvania Orders of Life Sustaining Treatment*
- *Major Re-write of the Older Adult Protective Services Act that has been considered over the last two legislative Sessions*
- *Proposed changes to Guardianship, including legislation affecting adult disabled guardianship*
- *Filial Support*
- *Legislation to merge the Departments of Health and Human Services*
- *Elder abuse powers of attorney*

In addition to these PAELA specific issues, Joe will provide insights into how the new legislature will address Pennsylvania’s budget issues in the wake of COVID 19, the overall legislative agenda and the general political climate of the Commonwealth.

12:45 -1:30 pm - SESSION #3

Dave Goldfarb, Director, NAELA Advocacy

“National Legislative and Regulatory Update for Elder Law Attorneys”

Learn and understand about recent and upcoming changes to Federal law and regulation that could impact Elder Law Practice. Topics include changes to Medicaid eligibility, home and community-based services, and income taxation.

1:30 – 2:30 pm - Session #4

Secretary Robert Torres, PA Secretary of Aging

“Current Issues before Pennsylvania’s Department of Aging”

“Secretary Robert Torres of Pennsylvania’s Department of Aging will be discussing issues that are currently before the Department that would impact Elder Law Attorneys in representing their clients. This would include the Department’s ongoing response to the Covid-19 pandemic.

CONTINUED

3:00-4:30 pm - Session #5**Coordinating Medicare and Medicaid Benefits – for ‘Dual Eligible’ Beneficiaries****William McKendree, Pennsylvania Healthcare Benefit Support**

Millions of Americans are enrolled in both the Medicare and Medicaid programs – they are called ‘dual eligibles’. This presentation will examine the characteristics of dual eligibility – the benefits that each program (Medicare and Medicaid) provides, how each program coordinates with the other, and the special problems that dual eligibility generates. We will also look at the impact of the Community Health Choices (CHC) initiative on access and utilization of healthcare by dual eligibles in Pennsylvania.

SATURDAY, FEBRUARY 27, 2021**9:15 – 10:15 am - Session #6****Judge Stanley Ott, Of Counsel, Mannion Prior****“The Benefits of Mediating Elder Law/Guardianship Disputes”**

This session will explore the cost and time saving benefits realized by using mediation to resolve classic Elder law/guardianship issues. Learn how an experienced mediator can be effective in preserving family relationships from the ravages of litigation.

10:15 – 11:15 - Session #7**Tracy Fox, Foresite and Kyle Ackerman, Lynx****3 Key Ways Law Firms Can Protect Themselves from Cyber Risk**

In this session, we will review cyber threats that put law firms at risk, some you hear about almost daily in the news and some that you may never have thought of. We will look at actual scenarios, the causes, and impact to the firms. Most importantly, we will discuss 3 key ways to protect yourself by minimizing your cyber risk and provide a checklist for you to take action.

11:15-11:30 am - BREAK**11:30 am – 12:30 pm - Session #8****Janet Colliton, CELA, Colliton Law and Karyn L. Seace, CELA Nescio & Seace****Advanced Elder Law Issues, Current Events**

Topics this year will include the following: (Handouts will be available prior to the Virtual Meeting)

- A. *Pennsylvania’s New Remote Notarization Law, Hot or Not? interstate recognition of notary acts and Pennsylvania’s new remote online notary law. Act 15 of 2020 (S.B. 841).*
- B. *Setting Every Community Up for Retirement Enhancement Act, (SECURE Act).*
- C. *The Family First Coronavirus Response Act, Public Law No. 116-127, §6008, (3/18/2020) and its impact on Medicaid planning during the COVID emergency.*
- D. *Legal issues surrounding the Department of Human Services seeking estate recovery for payments made by Commonwealth to Managed Care Organizations (MCOs) during transfer penalty imposed by County Assistance Office. 62 P.S. §1412*
- E. *Update of Pennsylvania’s Filial Support law, Year in Review. 23 Pa.C.S. §4603*
- F. *Zoom and client confidentiality.*
- G. *Living Wills and ventilator clauses.*
- H. *Practice and procedure before the DHS Bureau of Hearings and Appeals during the pandemic.*
- I. *Litigation against CCRCs for failing to timely refund entrance fees. Reviewing CCRC agreements.*
- J. *How to comply with applicable laws, regulations, and directives regarding COVID safety in the workplace, for employees and guests.*

END and Announcements