

KANSAS PARALEGAL ASSOCIATION

45th Annual Meeting and Seminar - 2022

FRIDAY, JUNE 17, 2022



KANSAS PARALEGAL ASSOCIATION

VIRTUAL VIA ZOOM

**ESI, AND HIPAA, AND
CRYPTO... OH MY!**

WWW.KSPARALEGALS.ORG

KANSAS PARALEGAL ASSOCIATION

2021-2022 Board of Directors, Coordinators, and Committee Members

Voting Board Members:

President – Vicki Yost, RP

President Elect – Vacant

VP Membership – Angie Konda

Secretary – Jeni Smith

Treasurer – Megan Tims, RP

Education Director – Samantha Anderson

Marketing Director – Crystal Sixbury

Publications Director – Sally Melms

District I Director – Vacant

District II Director – Abigail Emery, CRP

District III Director – Kaylee Divine

Appointed Board Members:

Pro Bono & Community Service Coordinator – Pat Pappaceno

Certification Coordinator – Vacant

NFPA Primary – Megan Tims, RP

NFPA Secondary – Crystal Sixbury

KBA Paralegal Committee – Megan Tims, RP

Job Registry Coordinator – Linda Joseph

Parliamentarian – Vacant

MISSION STATEMENT

The Kansas Paralegal Association, Inc. (KPA) is a nonprofit, professional organization comprised of three districts in the State of Kansas. KPA affirms the paralegal profession as an independent, self-directed profession in affiliation with the National Federation of Paralegal Associations, Inc. (NFPA) and maintains working relationships with state and local bar associations. KPA provides a local forum for exchange of ideas, creative development, continuing education, and promotes recognition of the profession as an integral partner in the delivery of legal services.

KPA is a professional association which offers membership to paralegals/legal assistants, students, paralegal educators, and institutions with an interest in supporting the purposes of the organization. KPA was incorporated on June 16, 1977 as a non-profit organization under the name of The Kansas Legal Assistants Society. In 1996 the organization changed its name to Kansas Paralegal Association. The goals and purposes of KPA are to:

- *Promote and maintain high standards in the paralegal profession;*
- *Foster creative expansion of the paralegal career;*
- *Provide a forum for meeting and exchanging ideas; and,*
- *Establish and maintain mutually beneficial working relationships with local, state and national paralegal and bar associations.*

KPA is comprised of three districts covering the state of Kansas. The association is governed by a Board of Directors composed of state officers and district directors. Board meetings are held throughout the year in various locations in the state and are open to interested KPA members.

The organization holds its annual membership meeting each spring in conjunction with an educational seminar. District meetings are held on a monthly or bi-monthly basis and offer members opportunities to address professional issues, enhance their education and exchange ideas with other paralegals.

Definition of a Paralegal

As adopted by KPA on June 5, 1987 a paralegal is a person, qualified through education, training or work experience, who is employed or retained by an attorney, law office, governmental agency, or other entity in a capacity or function which involves the performance, under the ultimate direction and supervision of an attorney, or specifically delegated, substantive legal work, which work, for the most part, requires sufficient knowledge of legal concepts that, absent such assistant, the attorney would perform the task.

Schedule of Events

8:00 - 9:00 **45th Annual Meeting (*Open to Current KPA Members Only*)**

9:00 - 10:00 **Workshop #1 - *A Paralegal's Guide to HIPAA, presented by Amanda Wilwert and Gabriella Grause, Foulston Siefkin, LLP***

10:00 - 10:20 **Break / Vendor Session**

10:20 - 11:20 **Workshop #2 – *Current Issues and Trends in Estate Planning, presented by Emily Donaldson, Stevens & Brand, LLP***

11:20 - 11:40 **Break / Vendor Session**

11:40 - 12:40 **Keynote Speaker: *An Introduction to Trans Advocacy, presented by Ellen Bertels and Tori Gleason (*1 Hour of Diversity, Inclusion, and Equity Ethics Credit)***

12:40 - 1:00 **Presentation of Awards; and Induction of the 2022-2023 KPA Board of Directors**

1:00 - 1:20 **Break / Vendor Session**

1:30 - 2:30 **Workshop #3 – *An Overview of Cryptocurrencies and NFTs, presented by O. Joseph Balthazor and Seungwon Chung, Taft Law***

2:30 - 2:50 **Break / Vendor Session**

2:50 - 3:50 **Workshop #4 – *A Paralegal's Guide to eDiscovery and ESI, presented by Aaron Bath, CEDS, RP, Global Director of Litigation & Legal Operations, Balfour Beatty***

4:00 - 5:00 **Social & Door Prizes – Must be present on the Zoom chat to win door prizes!**

A Paralegal's Guide to HIPAA

Amanda M. Wilwert, Partner

Gabriella C. Grause, Associate

FOULSTON SIEFKIN, LLP

Amanda Wilwert – Amanda Wilwert is a member of Foulston's healthcare practice group in the firm's Kansas City office. She represents a broad range of healthcare providers, including hospitals, ambulatory surgery centers, skilled nursing facilities, home health agencies, and licensed healthcare practitioners. She regularly counsels providers in healthcare regulatory matters, compliance, conditions of participation, conditions for coverage, state licensure, patient care issues, and Medicare and Medicaid reimbursement. She assists providers with HIPAA enforcement and compliance, including drafting and implementation of HIPAA compliance policies and procedures. Amanda advises clients in sensitive matters related to EMTALA, capacity to consent issues, patient care and treatment issues, and end-of-life matters.

Gabriella Grause – Gabriella Grause is a member of Foulston's health law practice group in the firm's Wichita office. She received her J.D. from Washburn University School of Law. Gabriella previously clerked with Foulston as a summer associate in 2018 and 2019. During that time, she researched and drafted memoranda on issues regarding contract modifications, potential facts issues precluding summary judgment, indemnification agreements, contract disputes, and Kansas's Corporate Practice of Medicine Doctrine.

Learning Objectives:

- Basics/Overview of HIPAA rules and regulations
 - Practical Guidance for Handling and Properly Redacting Records
 - Common Compliance Mistakes
 - HIPAA and COVID / Telemedicine
 - Recent Updates
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Current Issues and Trends in Estate Planning

Emily A. Donaldson, Attorney

STEVENS & BRAND, LLP

Emily A. Donaldson has been practicing in the areas of elder law and estate planning for over twenty years, is a Certified Elder Law Attorney (CELA) by the National Elder Law Foundation , and holds an advanced degree in Estate Planning (LL.M.). Her practice consists of advising clients on the complex issues encountered in aging, including pre-planning for the admission and access to Medicaid benefits to assist with long-term care expenses. In addition, Emily assists clients with designing and structuring their estate plans to meet their needs and goals, whether it be preserving the family farm/business or planning for special needs. She has counseled numerous individuals and families with special needs children through the complex legal and financial issues raised by the impairment. These issues often require the appointment of a guardian and conservator, as well as special needs trust creation and administration. Emily was selected as a member of the Special Needs Alliance, an invitation-only, national non-profit collective of leading disability and public benefits attorneys. She is an adjunct professor at Washburn University School of Law, for the Elder Law course, and at the University of Kansas School of Law, for Estate Planning Principles and Practice. Emily is also a member of the Probate Law Advisory Committee, as well as the Guardianship Committee, of the Kansas Judicial Council; and a frequent author and speaker on issues affecting the aged and individuals with disabilities.

Learning Objectives:

- Digital Assets
 - Tax Updates
 - Effects of COVID-19
 - Medicaid Planning
 - Ethics re Cybersecurity and Confidentiality
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Keynote Speakers

An Introduction to Trans Advocacy

Ellen Bertels, Attorney

KANSAS LEGAL SERVICES

Tori M. Gleason

Ellen Bertels – BIO COMING SOON

Tori Gleason – BIO COMING SOON

Learning Objectives:

- Legal Needs of Trans Kansans
 - Looking beyond the gender binary
 - Inclusive language and office practices
 - Advocacy skills in legal writing
 - Kansas Name Change Project – Kansas Legal Services
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An Overview of Cryptocurrencies and NFTs

O. Joseph Balthazor, Jr., Associate

Seungwon Chung, Associate

TAFT LAW

Joey Balthazor is an associate in the firm's Intellectual Property practice. He counsels clients on a variety of intellectual property-related matters. Joey is a graduate of Mitchell Hamline School of Law. During law school, he served as the Symposium Issue Editor for the Mitchell Hamline Law Review, Volume 43 and the President of the Mitchell Hamline Chapter of the Federal Bar Association. He also competed on behalf of Mitchell Hamline in the National Moot Court competition and received the Federal Bar Association Harry A. Sieben Scholarship Award. Joey earned a Bachelor of Arts in Economics with a minor in Spanish Studies from the University of Minnesota. At Minnesota, he played NCAA Division One football for the Golden Gophers, lettering three years as a walk on and earning Academic All-Big Ten honors. After completing his undergraduate degree, Joey earned a Master's of Education degree in Sport Management from the University of Minnesota.

Seungwon is an associate primarily focused in the area of domestic relations. Prior to joining Taft, Seungwon was a law clerk for the Honorable Michael E. Burns, Hennepin County District Court Judge. He received his J.D. from the University of Minnesota Law School and holds a Masters in Communication from Wake Forest University.

Learning Objectives:

- What is cryptocurrency, and how to identify a crypto exchange
 - What are NFTs and how to identify an NFT exchange
 - Valuing cryptocurrency and NFTs
 - The practical implications of a client owning them
 - Relevant case law
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A Paralegal's Guide to eDiscovery and ESI

Aaron Bath, CEDS, RP

GLOBAL DIRECTOR OF LITIGATION & LEGAL OPERATIONS, BALFOUR BEATTY

Aaron Bath, CEDS, RP has worked in complex commercial litigation since 2001 overseeing 150+ trials during his career. Currently, Aaron is the Global Director of Litigation & Legal Operations for Balfour Beatty, a \$14 Billion market-cap multinational infrastructure group. Prior to working in-house, Aaron worked for several top litigation law firms in Dallas and New York as a senior managing trial paralegal. Contemporaneous to his day job, Aaron is the adjunct professor of legal technology, eDiscovery, and litigation management at Southern Methodist University in Dallas, where he previously earned his Bachelor's degree in Jurisprudential studies and a graduate-level Paralegal certificate. Most recently, Aaron completed a professional certificate in Data Science & Analytics for Executives from Columbia University in New York, and Masters in Artificial Intelligence from MIT. In addition to authoring numerous articles in the areas of litigation management and legal technology, Aaron has been called as a subject-matter expert at trial for cases involving discovery abuse and violations. Aaron served as the President of the Dallas Area Paralegal Association (DAPA) in 2021.

Learning Objectives:

- An overview of eDiscovery and ESI
 - Relevant case law and applicable Federal Rules of Civil Procedure
 - Preservation and Legal Holds
 - Discovery Requests and Responses
 - Collection and Production of ESI
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