

Curriculum Vitae

Tracy L. Travis, OTD, OTR/L, CLCP

(formerly Witty)

FORMAL EDUCATION

- O.T.D. Boston University, Boston, MA
 Doctor of Occupational Therapy
 Dissertation Title: An Online Course: Introduction to Life Care Planning
 September 2018
- M.O.T. University of Southern Maine, Lewiston, ME
 Master of Occupational Therapy
 August 1999
- B.A. Western Washington University, Bellingham, WA
 Major: Exercise & Sports Science, Health and Recreation with a
 Specialization in Pre-Physical Therapy
 January 1996

CERTIFICATIONS

Certified Life Care Planner, International Commission on Health Care Certification, 2016
Functional Capacity Evaluation Certification, JTECH Medical, 2019

LICENSURE

Colorado Department of Regulatory Agencies, Div. of Professions & Occupations, 0006890
State of Nevada Board of Occupational Therapy, License Number OT-2726, 2021 – Present
California Board of Occupational Therapy, License Number 17910, 2017 - Present
College of Occupational Therapists of British Columbia, AC1418, 2002 to June 30, 2022
Washington State Department of Health, Licensed Occupational Therapist, 1999 – 2003
National Board for Certification in Occupational Therapy, Registrant, 1999 to present

PROFESSIONAL POSITIONS

2019 to date **CEO, Occupational Therapist & Certified Life Care Planner**

Turning Point Rehabilitation Consulting, Inc., DBA

Turning Point Life Care Planning, Los Angeles, California

Develop and rebut life care plans, conduct and rebut functional capacity evaluations, medical bill reviews, and vocational assessments for individuals who have experienced a traumatic injury and/or significant change in their daily functioning. Provide testimony in deposition, arbitration and trial proceedings. Contracted to work with Medicare patients with various medical issues in their homes (2021-2022). Responsible for business operations and leading team of other certified life care planners in providing medical legal services.

2005 to 2022 **Managing Director & Certified Life Care Planner**

Turning Point Rehabilitation Consulting, Inc., North Vancouver, BC, Canada

Responsible for business operations and leading team of occupational therapists and certified life care planners in providing individualized home health rehabilitation and life care planning. Occupational therapy services were provided to individuals who experienced traumatic injuries and those living with chronic health conditions, e.g. TBI, SCI, amputations, burns, musculoskeletal, orthopedics and pain. Occupational therapy services included cognitive rehabilitation, physical and behavioral activation programs, case management, return to school and work services, including ergonomic evaluations.

2002 – 2006 **Senior Consultant Occupational Therapist**

Community Therapists, Inc., Vancouver, B.C., Canada

Provided occupational therapy mainly for individuals who sustained injuries from motor vehicle accidents, workplace incidents, or medical errors. Occupational therapy services included cognitive rehabilitation, physical and behavioral activation programs, case management, return to school and work programming, including ergonomic evaluations and implementation.

2001 – 2003 **Occupational Therapist and Team Leader in Skilled Nursing Facilities**

Aegis Therapies, Bellingham, WA

Evaluated and provided occupational therapy to adults with cardiac, orthopedic, and neurological issues. Interventions included wheelchair and seating evaluations, use of physical agent modalities, exercise programs, selfcare training, and discharge planning. Managed billing and staff training.

- 1999 – 2001 Occupational Therapist
St. Joseph Hospital, Bellingham, WA
Evaluated and provided occupational therapy to individuals with acute medical conditions admitted to acute care hospital.
- 1999 – 2001 **Occupational Therapist**
Mount Vernon School District, Mount Vernon, WA
Collaborated with parents, teachers, and certified occupational therapy assistants to optimize students' school performance and play.
- 1996 – 1997 **Certified Personal Trainer - National Strength & Conditioning Assoc.**
Bellingham Athletic Club, Bellingham, WA
Provided fitness assessments, developed and monitored exercise programs.

PROFESSIONAL APPOINTMENTS OR ELECTED POSITIONS

- 2025 - 2027 Commissioner, CLCP, CCLCP ICHCC Board of Commissioners
- 2023 – 2026 Board Member, IARP Journal Editorial Board tasked with reviewing manuscripts for *The Rehabilitation Professional* and *Journal of Life Care Planning*.
- 2020 – 2022 IALCP Advisory Committee charged with updating the Standards of Practice for Life Care Planning by publishing the 4th Edition, September 2022.
- 2009 – 2011 Board of Directors, British Columbia Society of Occupational Therapists
- 2009 Chairperson, Professional Development Committee, British Columbia Society of Occupational Therapists (BCSOT)
- 2005 Chairperson, 2005 Host Committee, Canadian Occupational Therapy Assoc.

SOCIETY MEMBERSHIPS

- Since 2024 Occupational Therapy Association of California (OTAC)
- Since 2023 American Association of Nurse Life Care Planners (AANLCP)
- Since 2016 American Occupational Therapy Association (AOTA) & 1999-2003
- Since 2006 International Association of Rehabilitation Professionals (IARP)
- 2002-2022 Canadian Association of Occupational Therapists – British Columbia; formerly, British Columbia Society of Occupational Therapists (BCSOT)
- 2002-2022 Canadian Association of Occupational Therapists (CAOT)
- Since 2002 World Federation of Occupational Therapists (WFOT)

AWARDS

- 2019 IARP Emerging Professional Award

PUBLICATIONS

Neil, A. & Witty, T. (2021). Life care planning for vestibular disorders. *Journal of Life Care Planning, 19 (2)*.

Witty, T. (2019). "Transitioning to New Areas of Practice." In K. Jacobs and G. L. McCormack (eds.), *The Occupational Therapy Manager: Strategies for Leaders and Administrators*, (6th Edition). AOTA Press.

Witty, T. (2018). O.T.D. Dissertation, Boston University. *Introduction to Life Care Planning: An online course*. ProQuest LLC.

PRESENTATIONS

Travis, T. & Neil, A. (November 2024). *Navigating Life Care Planning: Empowering OT Practice in Complex Health Landscapes*. Occupational Therapy Association of California (OTAC) Annual Conference. Pasadena, CA.

Witty, T. & Neil, A. (March 2022). *Occupational Therapists' Role in Life Care Planning*. American Occupational Therapy Association Annual Conference. San Antonio, TX.

Witty, T. (October 2020). *Successful Trial Preparation as an Expert Witness*. International Association of Rehabilitation Professionals Virtual Conference.

Witty, T. & Abdel-Barr, J. (January 2019). *How Risk Factors Influence Rehabilitation & Future Care Recommendations*. Trial Lawyers of British Columbia Annual Medical Legal Conference. Fortuna, Costa Rica.

Witty, T. & Grant, T. (May 2010). *Tele-occupational therapy*. Workshop. Occupational Therapy West Regional Conference, Vancouver, BC.

Travis, T. (September 2004). *Ethical dilemmas & professional conduct*. Workshop, Invited Speaker, Insurance Corporation of British Columbia (ICBC), Abbotsford, B.C.

SCIENTIFIC POSTER PRESENTATIONS

Witty, T., & Jacobs, K. (March 2017). *Life care planning: An emerging area for occupational therapists*. American Occupational Therapy Association 100th annual conference, Philadelphia, PA.

Witty, T., & Jacobs, K. (March 2017). *The skill of being entrepreneurial*. American Occupational Therapy Association 100th annual conference, Philadelphia, PA.

VOLUNTEER

June 2022 **Adjunct Volunteer Professor**, Neurology
Episcopal University of Haiti, Faculty of Rehabilitation Sciences

CONTINUING EDUCATION

2025 Medicare Set-aside Certified Consultant (MSCC) Training Program

- Module 1: Workers' Compensation Insurance & Medicare
- Module 2: The When, How & Why of Medicare Set-Aside Allocation
- Module 3: The WCMSA Review & Introduction
- Module 4: Medical Review Guidelines & Pricing
- Module 5: The Information Require for WCMSA Submission to CMS
- Module 6: How to Submit the WCMSA to CMS

2024 IARP Fall Forum & IALCP Symposium, San Francisco, 2.5 days

- Life Care Planning Steps and Processes: American and Canadian Considerations
- Establishing a Basis for Supportive Care Recommendations in a LCP
- Standards, Sources and Stories: A New and Better Approach to Valuing and Pricing Life Care Plans.
- Costing Framework Tool: Update on Progress and Research Findings
- Healthcare Billing 101 and How to Defend Your Work Product
- Using Demonstrative Evidence with LCPs: A Video Tells a Million Words

2024 6th Annual OT in Mental Health Symposium- Virtual, 5.5 PEUs

- Occupational Therapy's Future in Psychedelic Mental Healthcare
- The Inje Self-Esteem Model
- Occupational Therapy in Program Development: Advocating for Cognition Inclusion for In-Home Support Services Evaluations
- Cognition Roundtable: Current Trends & Interventions

2023 Barrow Acquired Brain Injury & Spinal Cord Symposium, 2 days

- Defining the Role of Vagus Nerve Stimulation in Chronic Post-Stroke Motor Recovery
- Advances in Brain and Spinal Cord Injury: The NFL and Military Conditions
- The Assessment and Implementation of Treatment Strategies for Ocular Alignment
- Cognitive Impairments After Stroke: How to Evaluate and Treat
- Achieving Health Equity in Management of Neurological Disorders
- UE Management Post Acquired Brain Injury
- Traumatic Brain Injury Latest Research Review

- Central Sensitization
- Emergency Preparedness for Persons with Disabilities
- From Injury to Athlete
- Steps to Driving Independence
- Advocacy in Action – Self-advocacy and Legislative Strategy to Promote Well-Bring for Persons with Brain Injury
- CTN Work Re-Entry Process and Coordination of Care with Vocational Rehabilitation Services
- Social Determinants of Health in Traumatic Brain Injury
- Domestic Violence and Traumatic Brain Injury Discussion with Case Subjects

2023 IARP, LA Annual Conference, Virtual, 2-days

- Legal and Legislative Issues
- What you Can't See Does Matter (impact of non-imageable post-traumatic conditions)
- ADA Compliance in the Workplace
- Cultural Differences in Medical Treatment
- Role of the Economic Expert
- Social Media and the Code of Ethics
- How to Effectively Use a Work Conditioning/Hardening Program to Improve FCE Outcomes
- Responsibility of the PM&R to the Life Care Planner
- What a Life Care Planner Needs to Know about Prosthetics
- The Pandemic Paradox
- The Amazing Powers of Neuro Movement for TBI
- Is There Anything Other than a Knee Replacement

2022 AOTA Annual Conference, San Antonio, TX

- Becoming JEDI: Translating Justice, Equity, Diversity and Inclusion into OT Education & Practice.
- Exploring Pain Biology Education for Chronic Pain
- Helping Haiti Rehab
- Evaluation & Treatment of Concussion in the Military
- OT Pain Treatments & Amputation
- Delivering Ergonomic Services Through Telehealth

2020 IARP Annual Conference, Virtual

- Plaintiff Attorney Perspective
- Hearsay Challenges in Life Care Planning: A Sanchez Review

- Supporting the Use of FAIR Health Data in Life Care Plans
 - Keynote: Best Practices in Remote Assessment
 - Interventional Pain Medicine and Life Care Planning
- 2019 **IARP Annual Conference, Portland, B.C.**
- Extreme Ergonomics as a Return-to-Work or Disability Solution Development Tool
 - Prosthetic Cost Projection and the Capabilities of Amputees
 - Intensive Therapy after Spinal Cord Injury: What's the Return on Investment?
 - Welcome to the Future of Medicine- Medical Cannabis
 - Transgender Health: Sensitivity in Care, Treatment and Life Care Considerations
- 2019 Functional Capacity Evaluation Certification, JTECH Medical
- 2018 A Biopsychosocial Approach for Addressing Chronic Pain in Everyday Occupational Therapy Practice, CE Article
- 2018 Capstone, Boston University
- 2018 Doctoral Project, Boston University
- 2018 Outcome Measurement & Monitoring, Boston University
- 2017 Health Promotion & Wellness, Boston University
- 2017 Educational Theory & Practice, Boston University
- 2017 Doctoral Project, Boston University
- 2016 Social Policy & Disability, Boston University
- 2016 Evaluating Clinical Research and Theory, Boston University
- 2016 Doctoral Project, Boston University
- 2015 No Life Limited by Pain, 26th Annual Meeting, AAPM, Washington, D.C. (22.5 contact hours)
- 2015 Medical and Psychological Aspect of Life Care Planning, UFL
- Spinal Cord Injury: Adult and Pediatric, (20 contact hours)
 - Amputations: Adult and Pediatric, (20 contact hours)
 - Multiple disabilities, including chronic pain (20 contact hours)
- 2013 Forensic Aspects of Life Care Planning, Toronto, UFL (20 contact hours)
- 2013 8th Annual TBI Conference, Scripps Health, San Diego, CA (16 contact hours)
- 2012 Soft Tissue Injury Seminar, Vancouver, BC
- 2011 Medical and Psychological Aspects of Life Care Planning with Brain injury: Adult and Pediatric, Gainesville, FL
- 2010 Cost of Future Care, Vancouver, BC
- 2009 Chronic Pain on Trial: Myths, Mistakes and Misconceptions (TLABC)

2009 Cognitive Rehabilitation Workshop, Vancouver, BC
2007 Vocational Outcomes in Traumatic Brain Injury, Vancouver, BC
2007 Pacific Coast Brain Injury Conference, Vancouver, BC
2006 Putting It All Together, Life Care Planning Module 5, San Diego, CA
2006 Forensic Rehabilitation, Life Care Planning Module 3, San Diego, CA
2006 Tenets and Methodology Life Care Planning Module 1, San Diego, CA
2006 Spinal Cord Injury Life Care Planning, Module 2, San Diego, CA
2006 ABI: Supporting Positive Interactions and Behaviours, Chilliwack, BC
2006 The Essential Soft Tissue Injury Conference (TLABC), Vancouver, BC
2006 The Power Within, Vancouver, BC
2005 Life Care Planning, The Matheson System, Vancouver, BC
2004 Pain, Sleep and Depression (TLABC), Vancouver, BC
2003 Pacific Coast Brain Injury Conference, Vancouver, BC
2003 Pilates for Rehab – International Weightlifting Association, Seattle, WA
2003 Essential Soft Tissue Injury Conference (TLABC), Vancouver, BC
2002 Practical Seating and Positioning Solutions, Seattle, WA
2002 AOTA National Conference, Miami, Florida
2001 Designing Dementia Treatment Programs Using Allen Cognitive Level (ACL)
2000 Neurodevelopmental Treatment & Sensory Integration, Seattle, WA
1999 AOTA Special Interest Section, Pediatrics, Practice Conference, Reno, NV