

## CURRICULUM VITAE

**Helen C. Kales, M.D.**

Professor of Psychiatry

Director, Program for Positive Aging

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Research Scientist

Department of Veterans Affairs

Health Services Research and Development

Center for Clinical Management Research

Geriatric Research Education and Clinical Center

## EDUCATION AND TRAINING

09/1983-05/1987	Bucknell University, Lewisburg, PA; B.A. (Summa Cum Laude, Spanish Language and Literature, Biochemistry minor)
08/1987-05/1992	University of Rochester School of Medicine, Rochester, NY; M.D.
06/1992-06/1996	University of Michigan Psychiatry Resident, Ann Arbor, MI
07/1996-06/1998	University of Michigan Geriatric Psychiatry Fellow

## CERTIFICATION AND LICENSURE

Medical License, State of Michigan	Issued – 06/19/1996	Expires – 01/31/2018
Drug Enforcement Administration	Issued – 11/10/2009	Expires – 12/31/2017
1993	Diplomate, National Board of Medical Examiners,	
1997	Diplomate, American Board of Psychiatry and Neurology, Certificate (MOC 2008) – issued 1998 – expires 12/31/2018	
1998	Diplomate, Subspecialty of Geriatric Psychiatry, Certificate (MOC 2009) issued 1998 – expires 12/31/2019	

## **ACADEMIC, ADMINISTRATIVE AND CLINICAL APPOINTMENTS**

### Academic Appointments

07/1998-08/2001	Lecturer in Psychiatry, University of Michigan, Department of Psychiatry
07/1998-Present	Research Scientist, VA Center for Clinical Management Research, Health Services Research and Development
07/1998-Present	Research Scientist, VA Serious Mental Illness Treatment Resource and Evaluation Center
07/1998-Present	Research Scientist, Geriatric Research Education and Clinical Center, VA Ann Arbor Healthcare System
09/2001-08/2008	Assistant Professor of Psychiatry, University of Michigan, Department of Psychiatry
09/2008-08/2013	Associate Professor of Psychiatry with Tenure, University of Michigan, Department of Psychiatry
09/2013-Present	Professor of Psychiatry with Tenure, University of Michigan, Department of Psychiatry

### Administrative Appointments

03/2009-Present	Director, University of Michigan Program for Positive Aging
03/2009-12/2014	Director, Section of Geriatric Psychiatry, University of Michigan Department of Psychiatry
03/2009-2011	Assistant Director for Mental Health and Aging Research, The Geriatrics Center, University of Michigan
11/2011-Present	Associate Director for Mental Health and Aging Research, The Geriatrics Center, University of Michigan

### Clinical Appointments

07/1998-Present	Attending Physician, Geriatric Psychiatry Clinic, University of Michigan, Department of Psychiatry
07/1998-06/2009	Staff Physician, Geriatric Psychiatry Clinic, VA Ann Arbor Healthcare System
07/1998-06/2008	Director, Geriatric Psychiatry Clinic, VA Ann Arbor Healthcare System
07/1998-06/2001	Consulting Geriatric Psychiatrist, Battle Creek Veterans Affairs Medical Center

## **RESEARCH INTERESTS**

Psychotropic pharmacoepidemiology  
Assessment and management of behavioral and psychological symptoms of dementia  
Dementia care  
Later-life depression  
Racial disparities in later-life mental health treatment

## GRANTS

### *Present and Active*

1. Department of Veterans Affairs, HSRD, “Unintended Consequences: The Impact of Antipsychotic Reduction Efforts in Dementia”, 01/17-12/20, Principal Investigator, (\$874,563),
2. Department of Defense, “WeCareAdvisor: A Web-based Tool to Improve Quality of Life for Military Veterans with Dementia and their Caregivers”, 09/16-12/19, Principal Investigator, (\$774,233)
3. Michigan Health Endowment Foundation, “Enhancing Michigan Workforce Capacity for Behavioral Dementia Care Using the DICE Approach (MiDICE)”, 01/17-6/18, Principal Investigator, (\$405,850)
4. Department of Health and Human Services/Medicaid Match, “Enhancing Workforce Capacity for Behavioral Dementia Care Using the DICE Approach, 10/1/17-6/30/18, Principal Investigator (\$335,659)
5. Donaghue Foundation, “Unintended effects of antipsychotic reduction in nursing homes”; Principal Investigator Donovan Maust, Co-Investigator (5% effort), 9/2016–8/2018 (\$129,886).
6. National Institute of Mental Health, Site Co-Principal Investigator, “T32, Training Geriatric Mental Health Services Researchers”; 07/15-06/20 (\$653,365).
7. Department of Veterans Affairs, QUERI, “Improving Safety and Quality through Evidence-based De-implementation of Ineffective Diagnostics and Therapeutics”, 10/1/15-9/30/20, Principal Investigators David Au, Christian Helfrich, Adam Rose, Co-Investigator (15% effort), (\$3,949,540)
8. Department of Veterans Affairs, QUERI, “Implementing Goals of Care Conversations with Veterans in VA LTC Settings”, 10/1/15-9/30/20, Principal Investigator Anne Sales, Co-Investigator (20% effort years 2-4 and 10% year 5), (\$3,982,173)
9. Department of Veterans Affairs, HSR&D Merit Award, “VA response to guidance regarding risks of psychotropic medication use;” 10/2015-03/2019, Principal Investigators: Kara Zivin, Anne Sales. (10% effort), (\$1,097,874)
10. NIH/NIA 1K08AG048321, Paul B. Beeson Career Development Award in Aging Research; “Preventable hospitalization in dementia: the impact of neuropsychiatric symptoms”, 8/2014–6/2018, Principal Investigator Donovan Maust, Primary Mentor (effort cost-shared).

11. NIH/NIA 1K01AG056557, “Style and substance: Characterizing dementia caregiving styles and associated biopsychosocial and health services utilization outcomes”, (8/2017-5/2022), Principal Investigator Amanda Leggett, Primary Mentor (effort cost-shared).
12. Administration for Community Living, “Disseminating DICE to Wisconsin Dementia Care Specialists”, Principal Investigator Jane Mahoney, (9/2016-10/2019), Co-Investigator.
13. Michigan Center on the Demography of Aging (MiCDA), "Multimorbidity Patterns in Aging Couples: Longitudinal Associations with Functional Disability," Principal Investigator Courtney Polenick, Co-Mentor with Kira Burditt (effort cost-shared).
14. Alzheimers Society (UK), “New Interventions for Independence in Dementia”, 9/2017-8/2022, Principal Investigator Claudia Cooper, Co-Investigator.

*Summary of Previous Grants*

1. University of Michigan Geriatrics Center/Institute of Gerontology Pilot Grant, “Health Care Outcomes and Utilization in Older Patients with Coexisting Dementia and Depression”; 7/98-6/99, Principal Investigator, (\$20,000)
2. Rachel Upjohn Clinical Scholars Awards Program, University of Michigan Department of Psychiatry, “Depression and Dementia”; 10/98-6/02, Principal Investigator, (\$30,000)
3. American Geriatrics Society/Pfizer 2001 Postdoctoral Fellowship for Research on Health Outcomes in Geriatrics, “The Effect of Race on Physician’s Diagnosis and Treatment of Major Depression in the Elderly”; 7/01-6/02, Principal Investigator, (\$32,500)
4. Pfizer Inc., Unrestricted gift, Incremental funding of “The Effect of Race on Physician’s Diagnosis and Treatment of Major Depression in the Elderly”; 4/02-8/02, Principal Investigator, (\$18,500)
5. Blue Cross/Blue Shield Foundation, “Primary Care Physicians’ Diagnosis and Treatment of Late-life Depression”; 10/02-11/03, Principal Investigator, (\$50,000)
6. VA HSR&D Career Development Award (RCD 00-037), “Complexity in Geriatric Depression: The Impact of Confounding Factors on Outcomes; 9/01-8/04, Principal Investigator, (\$529,157)

7. Reynolds, Donald W., Foundation: Comprehensive Programs to Strengthen Physicians' Training in Geriatrics; 7/01 to 6/05, Member, Faculty Component, (\$1,500,000)
8. VA HSR&D Advanced Career Development Award (RCD Level 2 00-037), "Quality Depression Care for Older Veterans: Tackling Treatment Issues"; 9/05-8/07, Principal Investigator, (\$653,997)
9. Department of Veterans Affairs, IIR, "Suicide Among Veterans: Using the VA Depression Registry to Inform Care"; 7/05-6/08, Principal Investigator Marcia Valenstein MD, Co-Investigator, (\$783,812)
10. National Institute on Aging, Pilot Grant to Michigan Center on the Demography of Aging (MiCDA), "The Impact of Depression and Cognitive Impairment on Enrollment in Medicare Part D"; 7/07-6/09, Principal Investigator Kara Zivin, Co- Investigator/Mentor, (\$13,000)
11. National Institute on Aging/University of Michigan Older Americans Independence Center Research Career Development Core Award, "Geriatric Depression and Workforce Participation: Productivity, Disability, and Retirement Outcomes"; 7/08-6/09, Principal Investigator Kara Zivin, Co-Investigator/Mentor (\$16,500)
12. National Institute of Mental Health, R21, "Racial Differences in Geriatric Antidepressant Adherence"; 9/1/06-8/09, Principal Investigator, (\$376,200)
13. MICHR Pilot and Collaborative Grant Program, University of Michigan Department of Psychiatry, "The Role of Cognitive and Affective Factors in Explaining Increased Risk of Falls among Patients with Geriatric Depression"; 10/08-9/09, Principal Investigator Sara Wright, Co-Investigator/Mentor, (\$35,000)
14. Donor Gift to Fund Kales Research in Depression/Dementia, Neurology department, "Investigation of Neuroanatomical Networks to Understand Late Onset Depression"; 3/1/09-2/28/10, Co-Principal Investigator, (\$25,000)
15. Michigan Alzheimer's Disease Research Center pilot grant, "Investigation of Neuroanatomical Networks to Understand Late Onset Depression"; 6/09-5/10, Principal Investigator Sara Wright PhD, Co-Investigator, (\$35,000)
16. Department of Veterans Affairs, IIR, "VA Nursing Home Care for Veterans with Serious Mental Illness"; 7/07 - 6/10, Principal Investigator John McCarthy PhD, Co-Investigator, (\$598,319)

17. Department of Veterans Affairs, IIR, “Modifiable Determinants of Antidepressant Adherence among Older Veterans”; 3/07-2/11, Principal Investigator, (\$716,532)
18. National Institute of Mental Health, R01, “Antipsychotics and Mortality in Older Patients”; 9/07-4/11, Principal Investigator, (\$871,291)
19. US Food and Drug Administration/VA Pharmacy Benefits Management, “Impact of Antipsychotic Use in VA Patients”; 1/10-3/11, Principal Investigator, (\$250,000)
20. Department of Veterans Affairs, IIR, “Improving Depression Management Through Peer Support.”; 2/09-1/13, Principal Investigator, Marcia Valenstein, MD, Co-Investigator, (\$923,000)
21. Department of Veterans Affairs, IIR, “The Risk of Death Among Veterans with Depression”; 9/11-8/14, Principal Investigator, Kara Zivin, PhD, Co-Investigator, (\$452,000)
22. National Institute of Mental Health, R01, “Personalized Antidepressant Adherence Strategies for Depressed Elders”; 8/10-5/16, Principal Investigator, (\$1,699,500)
15. Department of Veterans Affairs, IIR, “Antipsychotic Use in Parkinson Disease: Association with Morbidity and Mortality”; 08/13-09/16, Principal Investigator, (\$750,000)
16. National Institute of Nursing Research, R01, “An Innovative Caregiver Tool to Assess and Manage Behavioral Symptoms of Dementia”; 9/12-12/16, Principal Investigator, (\$1,729,215)
17. University of Michigan, Michigan Translational Research and Commercialization (UM MTRAC) for Life Sciences Program, “WeCareAdvisor: A Novel Web-Based Tool to Assess and Manage Behavioral Symptoms of Dementia”, 05/16-06/17, Principal Investigator, (\$208,457)
18. University of Michigan, M-Cubed, “Michigan LEAn thinking for Dementia care (M-LEAD)”, 05/16-06/17, Principal Investigator, (\$60,000)

## **HONORS AND AWARDS**

### *College*

1984  
1984

Phi Eta Sigma Freshman Honor Society  
Alpha Lambda Delta Honor Society

1984 Sigma Delta Pi, Spanish Honor Society  
 1984 Mortar Board National Leadership Honor Society  
 1984 Selected to take Freshman Prize Examination in Mathematics  
 1984-1986 President's Award for Distinguished Academic Achievement  
 1987 Phi Beta Kappa  
 1987 J. Orin Oliphant Award at Graduation  
 1987 Phi Eta Sigma Award at Graduation

*Medical School*

1987-1992 Honors grades in 17 courses  
 1988-89 Selected as a Biochemistry Tutor

*Residency*

1996 Laughlin Fellow, The American College of Psychiatrists  
 1996 Lilly Fellow, The Society of Biological Psychiatry  
 1995-1997 The Journal of Clinical Psychiatry/Janssen Pharmaceutical  
 Resident Advisory Board  
 1996 University of Michigan Department of Psychiatry/Upjohn  
 Achievement ("Resident of the Year") Award

*Fellowship*

1997 Selected as a Ginsburg Fellow, Group for the Advancement  
 of Psychiatry  
 1998 Member In Training Award for best original research  
 submission ("Health Care Utilization by Older Patients with  
 Coexisting Dementia and Depression"), American  
 Association for Geriatric Psychiatry  
 1998 American Psychiatric Association/Lilly Resident Research  
 Award (for "Health Care Utilization by Older Patients with  
 Coexisting Dementia and Depression"; one of five recipients  
 nationally)  
 1998 Selected as a participant, American Association for Geriatric  
 Psychiatry, Summer Research Institute

*Faculty*

2001 American Geriatrics Society/Pfizer 2001 Postdoctoral  
 Fellowship for Research on Health Outcomes in Geriatrics  
 (one of two recipients chosen nationally from applicants in  
 Geriatric Medicine, Neurology and Psychiatry)  
 2003 Junior Investigator Award, American Association for  
 Geriatric Psychiatry, best original research submission ("The  
 Effect of Race and Gender on Psychiatrists' Diagnosis and  
 Treatment of Major Depression in the Elderly")

2005	Selected as a Scholar (one of eight investigators nationally), NIMH Advanced Research Institute in Geriatric Mental Health
2008-2013	Selected as a Mentor (one of fifteen senior researchers nationally), NIMH Advanced Research Institute in Geriatric Mental Health
2012	Research article (Risk of mortality among individual antipsychotics in patients with dementia. <i>Am J Psychiatry</i> 2012 Jan; 169:7) chosen by <i>Journal Watch Psychiatry</i> as one of 10 Psychiatry Top Stories of 2012 ( <a href="http://psychiatry.jwatch.org/cgi/content/full/2012/1228/1">http://psychiatry.jwatch.org/cgi/content/full/2012/1228/1</a> )
2013-present	Selected for inclusion to Best Doctors in America
2013	Selected for inclusion in Hour Magazine (Detroit) Top Docs, Alzheimer's
2014	Research article (Mindfulness-based cognitive therapy with older adults: an exploratory study. <i>Journal of Gerontological Social Work</i> , 57:498–520, 2014) one of the most downloaded articles published in Routledge Health and Social Care journals in 2014 <a href="http://bit.ly/health-social-care-most-read">http://bit.ly/health-social-care-most-read</a>

## MEMBERSHIPS IN PROFESSIONAL SOCIETIES

1996 – Present	American Association for Geriatric Psychiatry (AAGP)
2011 – Present	International Society to Advance Alzheimer's Research and Treatment (ISTAART)
2015 – Present	International Psychogeriatric Association (IPA)

## EDITORIAL POSITIONS, BOARDS, AND PEER-REVIEW SERVICE

<u>Journal Reviewer</u>	<i>American Journal of Psychiatry</i> (2007-)
Ad Hoc	<i>Annals of Internal Medicine</i> (2011-)
	<i>Archives of General Psychiatry</i> (2011-)
	<i>American Journal of Geriatric Psychiatry</i> (2000-)
	<i>British Journal of Psychiatry</i> (2014-)
	<i>Drugs and Aging</i> (2005-)
	<i>International Journal of Geriatric Psychiatry</i> (2010-)
	<i>International Psychogeriatrics</i> (2012-)
	<i>Journal of Geriatric Psychiatry and Neurology</i> (1998-)
	<i>Journal of the American Geriatrics Society</i> (1998-)



*Journal of the American Medical Association (2014-)*  
*Journal of General Internal Medicine (2001-)*  
*Journal of Aging and Mental Health (2010-)*  
*Journal of Clinical Psychiatry (2006-)*  
*Lancet (2007-)*  
*Medical Care (2001-)*  
*New England Journal of Medicine (2014-)*  
*Psychology and Aging (2013-)*  
*Psychosomatics (2007-)*

Editorial Board

2011-present *American Journal of Geriatric Psychiatry*

Triage Editor

2010-2013  
2016-present *American Journal of Geriatric Psychiatry*

Associate Editor

2012-present *International Psychogeriatrics*

Guest Editor

2002 Kales HC and Blow FC, *Journal of Geriatric Psychiatry and Neurology*, special issue on later-life mental health services Research

Grant Reviewer

2004 NIMH-funded Summer Training on Aging Research Topics-Mental Health Fellowship Program

2007 National Institute for Health Research (UK)

2008 University of Michigan Pilot and Collaborative Grant Program for Translational and Clinical Research (MICHR)

2010 Alzheimer's Association, Research Grants Program

2010	NIMH, Adult Psychopathology and Disorders of Aging Study Section
2011, 2013-2015	VA Merit Review Subcommittee for Epidemiology
2016	Uniformed Services University Medical School, Department of Defense
2016	Center for Scientific Review, Special Emphasis Panel
2017	Economic and Social Research Council (UK)
2017	Physicians' Services Incorporated Foundation (Canada)

#### Peer-Review Committee Membership

2001-2002	Member, Scientific Program Committee (New Research and Scientific and Clinical Reports Subcommittees), American Psychiatric Association
2005-2010	Member, Subcommittee on Human Studies, VA Ann Arbor Healthcare System
2009-Present	Member, Program Committee, American Association for Geriatric Psychiatry Annual Meeting
2016-Present	Annual meeting abstract reviewer, Alzheimer's Association International Conference

#### Expert Panels

2011	Detroit Expert Panel on the Assessment and Management of Neuropsychiatric Symptoms of Dementia, Chair
2015-2016	International Psychogeriatric Association, Expert Panel on Behavioral and Psychological Symptoms of Dementia, Co-Chair
2015-2016	BrightFocus Foundation, National Expert Consensus Panel on Accelerating the Development, Testing and Dissemination of Home-based Dementia Care Inventions, Member
2016-2017	Lancet Global Commission on Dementia Care, Commissioner

- 2017-present Alzheimer's Association Best Clinical Practice Guidelines  
National Working Group
- 2017 Co-Chair, NIMH/NIA Workshop on Novel Approaches to  
Understanding the Mechanisms of the Neuropsychiatric  
Symptoms in Alzheimer's and Advancing Therapy  
Development, Bethesda MD, May 5-6, 2017

## **TEACHING ACTIVITIES**

### Medical School/Department of Psychiatry

#### *Medical Student Summer Research Mentor*

- 2004 Andrew DiNardo, Medical Student, Wayne State University,  
NIMH-funded START-MH program, "Impact of physician  
characteristics on the diagnosis of late-life depression"
- 2007-2009 Rashad Albeiruti, Medical Student, Wayne State University,  
"Use of a medical record search engine to enhance screening  
for later-life depression"

#### *Fellow/Resident Training*

- 2003-2005 Peijun Chen, MD PhD, Resident/Fellow, Department of  
Psychiatry, "Parkinson's disease and psychotropic use"
- 2005-2007 Howard Liu MD, Resident, Department of Psychiatry,  
"Educating residents on medical-psychiatric issues: The  
Weakest Link"
- 2006-2007 Loman Lin MD, Resident, Department of Psychiatry,  
"Antipsychotic prescribing in delirium"
- 2010-2011 Sachin Bhalerao MD, Fellow, Department of Psychiatry,  
"Mortality risk with use of antipsychotics in later-life bipolar  
disorder", first-place in trainee poster competition at the  
Silverman Conference (2011)
- 2011-2012 Laurie Boore MD, Fellow, Department of Psychiatry,  
"Medical students and stigma toward the elderly"
- 2011-2013 Katherin Rockefeller MD, Resident, Department of  
Psychiatry, "Assessment and Management of

Neuropsychiatric Symptoms of Dementia for Resident Physicians”

- 2012-2013 Faculty Advisor, PGY IV Class
- 2013-2015 Lauren Gerlach DO, Resident, Department of Psychiatry, “Impact of a pharmacy-based intervention after the FDA citalopram warning”
- 2014-2016 Ryan Silwanowicz MD, Resident, Department of Psychiatry, “Outcomes of neuropsychiatric symptoms of dementia in a ED setting”
- Post-doctoral Trainees*
- 2010-2011 Vicki Johnson-Lawrence PhD, Post Doctoral Fellow, University of Michigan T32 in Mental Health Services and Aging, “Religion, spirituality and later-life depression”
- 2011-2012 Ola Rostant PhD, Post Doctoral Fellow, University of Michigan T32 in Mental Health Services and Aging, “Racial disparities in later-life depression”
- 2012-2014 Tracy Wharton PhD, Post Doctoral Fellow, University of Michigan T32 in Mental Health Services and Aging, “Aggression toward caregivers in patients with dementia”
- 2014-2015 Iquo Nafiu MD, Post Doctoral Fellow, University of Michigan T32 in Mental Health Services and Aging, “Substance Abuse in Older Adults”
- 2013-2017 Amanda Leggett PhD, Post Doctoral Fellow, University of Michigan T32 in Mental Health Services and Aging, “Sleep and later life depression”, “Caregiver styles”, received Jenkins Award, UM Depression Center (2014-2016), winner trainee poster competition UM Dept of Psychiatry Silverman Conference 2016
- 2016-present Courtney Polenik PhD, Post Doctoral Fellow, University of Michigan T32 in Mental Health Services and Aging, “Dementia Caregiving”, received Michigan Center for the Demography of Aging funding 2017
- 2015-2017 Lauren Gerlach DO, Geriatric Psychiatry Fellow, Department of Psychiatry, “Later-life pharmacoepidemiology”, received STAR funding 2017

*Junior Faculty Mentoring*

- 2006-2014 Kara Zivin PhD, Associate Professor, Department of Psychiatry, received VA Career Development Award (2009-2013), PI on VA Merit Award
- 2006-2015 Lisa Seyfried MD, Clinical Associate Professor, Department of Psychiatry, received Dlin/Fischer Clinical Research Award at the Academy of Psychosomatic Medicine for “Predictors of Suicide in Older Patients with Dementia” (2009)
- 2007-2012 Sara Weisenbach PhD, Assistant Professor, Department of Psychiatry, University of Utah, Mentor for VA RRD Career Development Award (2012-2017), received NARSAD Award (2013-2015)
- 2010-2011 Jennifer Morse PhD, Assistant Professor, Department of Psychiatry University of Pittsburgh
- 2010-2017 Daphne Watkins PhD, Associate Professor, School of Social Work, received Michigan Center for Urban African American Aging Research grant (2011-2012), Jenkins Award from UM Depression Center (2014-2015)
- 2011-2012 Lisa Barry PhD, Assistant Professor, Department of Psychiatry, University of Connecticut, received American Foundation for Suicide Prevention grant (2012) and R01 (2015)
- 2013-2014 Jennifer Wolff PhD, Associate Professor, Department of Health Policy and Management, Johns Hopkins Bloomberg School of Public Health and Division of Geriatrics and Gerontology, Johns Hopkins University School of Medicine; awarded R21 and R01 (2015)
- 2013-present Donovan Maust MD, Assistant Professor, Department of Psychiatry, University of Michigan, received Beeson Career Development Award/K08 (NIA/Hartford Foundation, 2014-2018), VA Merit Award (2017)
- 2017-present Lauren Gerlach DO, Clinical Lecturer, Department of Psychiatry, University of Michigan
- 2017-present Amanda Leggett PhD, Assistant Professor, Department of Psychiatry, University of Michigan, received NIA K01 2017

### *National Training Roles*

May 7-10, 2008	Mentor/Faculty, NIMH Advanced Research Institute for Geriatric Psychiatry, Winston-Salem, North Carolina
July 19-25, 2008	Mentor/Faculty, NIMH Summer Research Institute for Geriatric Psychiatry, Philadelphia, PA
July 25-31, 2009	Faculty/Site Host, NIMH Summer Research Institute for Geriatric Psychiatry, Ann Arbor, MI
March 24-27, 2010	Mentor/Faculty, NIMH Advanced Research Institute for Geriatric Psychiatry, Tubac, Arizona
April 6-9, 2011	Mentor/Faculty, NIMH Advanced Research Institute for Geriatric Psychiatry, Westchester, New York
March 17, 2012	Mentor/Faculty, American Association for Geriatric Psychiatry National Meeting, Junior Investigator Poster Rounds, Washington, DC.
April 18-21, 2012	Mentor/Faculty, NIMH Advanced Research Institute for Geriatric Psychiatry, Adairsville, Georgia
April 3-6, 2013	Mentor/Faculty, NIMH Advanced Research Institute for Geriatric Psychiatry, Winston-Salem, North Carolina

### Intramural Teaching Supervision

1988-1989	Biochemistry Tutor, University of Rochester School of Medicine
1996-2005	Lecturer, Third-Year Medical Student Psychiatry Clerkship, Mood Disorders, University of Michigan
1997-1998	Additional supervision for Psychiatric Residents on the Geriatric Psychiatry Rotation as a Geriatric Psychiatry Fellow
1998-2009	Lecturer to HO-I Psychiatric Residents, Psychiatric Syndromes due to General Medical Conditions, University of Michigan

1998-present	Faculty supervisor for Psychiatric Residents, University of Michigan Geropsychiatry Clinic
1998-present	Faculty supervisor, University of Michigan Geropsychiatry Fellowship Program
1999-2003	Lecturer, HO-III Psychopharmacology Core, Psychiatric Symptoms due to Medical Drugs, University of Michigan
1999-2014	Co-Course Director and Lecturer, Geropsychiatry Core Series for HO-III Residents, University of Michigan
2001-2014	Faculty supervisor for rotating Geriatric Medicine Fellows, University of Michigan Geriatric Psychiatry Clinic
2001-2004	Faculty examiner, Comprehensive Clinical Assessment for Medical Students, University of Michigan
2003-2009	Training Director, VA Component, Geriatric Psychiatry Fellowship Program
2005-2009	Lecturer, Third-Year Medical Student Psychiatry Clerkship, Geriatric Psychiatry, University of Michigan
2005-2007	Faculty Advisor, “Weakest Link”, Monthly Evidence-Based Medicine Contest for Residents
2008	Co-Course Director, University of Michigan/VA Ann Arbor GRECC Fall Conference, <i>Managing Depression, Substance Use and Other Psychiatric Disorders in Later-life</i> , September 25-26, 2008
2009-present	Lecturer, Geropsychiatry Core Series for HO-II Residents, University of Michigan

Intramural Invited Presentations

2000-2002	Lecturer to Masters of Social Work Students on Geriatric Psychiatry, Hartford Seminar Series, University of Michigan
June 20, 2001	University of Michigan School of Social Work, Hartford Geriatric Social Work Program, “DSM-IV and Depression and Anxiety in Older Adults”

- July 12, 2001 University of Michigan Department of Psychiatry  
Psychopharmacology Update, “Depression and Dementia”,  
Traverse City, MI
- September 21, 2001 University of Michigan Department of Internal Medicine  
Conference *The Challenge of Diabetes Care in Older Adults*,  
“Late-Life Depression and Diabetes”
- 2001-2005 Teaching presentations, Late-Life Depression, Reynolds  
Fellows, University of Michigan
- March 26, 2002 University of Michigan School of Social Work, Hartford  
Geriatric Social Work Program, “Depression and Anxiety in  
Older Adults”
- September 6, 2002 Geriatric Medicine Fellowship Series, University of  
Michigan, Discussant, “Depression in the Elderly Patient”
- April 8, 2003 University of Michigan School of Social Work, “Geriatric  
Psychiatry”
- July 12, 2003 University of Michigan Department of Psychiatry  
Psychopharmacology Update, “Vascular Depression”,  
Traverse City, MI
- October 21, 2003 Collaborative Center for General Medicine and Geriatrics,  
University of Michigan, “Late-Life Depression”
- March 26, 2004 Institute for Social Research, University of Michigan,  
*Psychosocial Factors in Mental Health Postdoctoral  
Seminar*, “Race and the Diagnosis of Depression in Older  
Adults”
- April 4, 2004 University of Michigan School of Social Work, Masters  
Level course in Psychopathology, “Late-Life Mental  
Disorders”
- April 4, 2004 University of Michigan School of Art, *Depression and  
Expression* course, “Aging and Depression”
- December 5, 2005 Institute for Social Research, University of Michigan,  
*Psychological Health and Illness* (Postdoctoral Level  
Course), “Patient and Physician Characteristics and the  
Influence on Depression Diagnosis and Treatment”



- December 13, 2005 University of Michigan Geriatric Center, Noon Seminar, Ann Arbor, MI, “Antipsychotic Use in Dementia: Is There Increased Risk of Mortality?”
- October 6, 2006 University of Michigan Department of Neurology Conference, *Critical Care Issues in the Care of Older Adults: Dementia*, “Depression in Dementia”
- October 2006 University of Michigan Health Minute, “Spotting Depression in the Elderly at the Holidays”
- November 16, 2006 University of Michigan Depression Center, Community Volunteer Group, Ann Arbor, MI, “Late-Life Depression and Treatment Adherence”
- March 27, 2007 General Medicine Clinical Conference, University of Michigan, “Everything you might want to know about late-life depression but were too busy to ask”
- September 12, 2007 VA Ann Arbor Healthcare System, Panel Presentation for Suicide Prevention Awareness, “Suicide in Later Life”
- September 25, 2007 Psychiatry Grand Rounds, VA Ann Arbor Healthcare System, “Later-life Depression”
- October 19, 2007 Hospital Services Huddle, University of Michigan Department of Psychiatry, Discussant, “Later-Life Mania in a Physician”
- November 9, 2007 University of Michigan Department of Psychiatry, *Advances In Psychiatry Conference*, “The Interaction of Medical Illness with Later-life Depression”
- January 23, 2008 University of Michigan Department of Psychiatry Grand Rounds/Martin Luther King Day Presentation, “Impact of Race on the Diagnosis and Treatment of Depression”
- September 17, 2008 University of Michigan Program for Multicultural Health, “Depression in Later Life”, presentation for ethnic Chinese elder community
- September 25, 2008 University of Michigan/VA Ann Arbor GRECC Fall Conference, *Managing Depression, Substance Use and Other Psychiatric Disorders in Later-life*, “Depression and Dementia”

- December 4, 2008 University of Michigan Institute of Gerontology,  
“Antipsychotics and Mortality in Later Life”
- October 1, 2009 Michigan Alzheimer’s Disease Research Center Conference  
on *Advances in Prevention, Diagnosis and Treatment of AD*,  
“Update on Depression and Dementia”
- October 8, 2009 University of Michigan Depression Center Lunch and Learn  
Event, *Aging with Happiness: Emotional Wellness for  
Women through the Lifespan*, “Promoting Emotional and  
Cognitive Wellbeing in Later Life: The Program for Positive  
Aging”
- January 27, 2010 University of Michigan Turner Senior Resource Center,  
*Positive Aging with Grace and Style*, “Improving Mood and  
Memory”
- February 10, 2010 University of Michigan Women’s Health Program, Ann  
Arbor Public Library, *Approaching Mid-Life with a Positive  
Attitude*, “Promoting Emotional and Cognitive Wellbeing in  
Later Life: The Program for Positive Aging”
- August 23, 2010 University of Michigan, Department of Psychiatry, Resident  
Research Track Core, “Answering Research Questions Using  
Mixed-Methods Research”
- December 3, 2010 University of Michigan, Department of Psychology, Invited  
Discussant, *Keeping It Positive: Science and Successful  
Aging in the 21<sup>st</sup> Century*, Positive Aging Symposium.
- May 22, 2012 University of Michigan, General Medicine Clinical  
Conference, “Assessing, Managing and Treating Depression  
in the Older Primary Care Patient”.
- October 4, 2012 University of Michigan Work/Life Resource Center  
Conference, *Connecting the Dots: Navigating Obligations,  
Expectations, and Goals in Work and Personal Life*, “Making  
the Most of What You’ve Got: The Path to Positive Aging”.
- May 7, 2013 University of Michigan Mini-Medical School, *Psychiatry:  
Common Disorders and New Developments*, “Geriatric  
Psychiatry: Depression, Dementia and Positive Aging”.
- April 1, 2014 University of Michigan Geriatric Medicine Clinical  
Conference, “An Innovative Caregiver Tool to Assess and  
Manage the Behavioral Symptoms of Dementia”

- April 14, 2015 University of Michigan School of Public Health, *Mental Health Interventions* Course, “Addressing Behavioral Symptoms of Dementia: The DICE Approach and the WeCareAdvisor”
- May 19, 2015 University of Michigan Geriatrics Clinical Conference, “WeCareAdvisor Tool to Assist Families Living with Dementia”
- April 26, 2016 University of Michigan School of Social Work, Hartford Center of Excellence Dementia Certificate Program, “Managing Behavioral and Psychological Symptoms of Dementia: Is there a better way?”
- May 17, 2017 University of Michigan Mini-Medical School, *Aging: Challenges and Opportunities*, “Positive Aging: Aging well by playing the cards you’ve been dealt”.

## **COMMITTEE, ORGANIZATIONAL AND VOLUNTEER SERVICE**

- 2002-2003 Search Committee, Mental Health Clinic Chief, VA Ann Arbor Healthcare System
- 2006-2007 Depression Center Volunteer Committee, Faculty Liaison
- 2008-2011 and 2012-2015 Member, Appointments and Promotions Committee, Department of Psychiatry, University of Michigan
- 2009-2015 Member, Psychiatry Senior Leadership Council, Department of Psychiatry, University of Michigan
- 2009-2011 Executive Committee, M-STREAM, NIMH-funded research training program for medical students in aging and mental health
- 2010-2015 Member, Department of Psychiatry Research Council
- 2011-2014 Member, Michigan Alzheimer’s Disease Center Advisory Board, University of Michigan
- 2012-2016 Veterans Integrated Service Network 11, Committee on Dementia and Subcommittee on Challenging Behaviors in Dementia

2012-2013	Member, Department of Psychiatry Research Strategic Planning Committee
2012-present	Member, Department of Psychiatry Martin Luther King Day Lecture Planning Committee
2013-2015	Member, Department of Psychiatry Space Committee
2013-2017	Chair, Data Safety and Monitoring Board, Ecosystem Therapy for Depressed Stroke Survivors (NIMH R01 MH096685, PI George S. Alexopoulos MD)
2013-present	Member, University of Michigan Hartford Center of Excellence in Geriatric Social Work Advisory Board
2014-present	Member, Michigan Alzheimers' Disease Center, Internal Advisory Board

## **EXTRAMURAL INVITED PRESENTATIONS**

### Local/State

1. Michigan Assisted Living Association, "The Interface of Depression and Dementia, Lansing MI, May 6, 2001.
2. Michigan Radio Interview, "Late-life Depression and Dementia", December 21, 2001.
3. Blue Cross Blue Shield Foundation, *Older Adult Depression Initiative*, "Where Depression Meets Dementia", Traverse City MI, July 11, 2003.
4. Sunrise Assisted Living, Breakfast Speaker Series, "Late-Life Depression", Ann Arbor MI May 21, 2004.
5. University Commons, Senior Living for University Alumni, "Hearts and Brains: How Do Depression and Vascular Diseases Link?", Ann Arbor MI, July 14, 2004.
6. VA Psychiatry Grand Rounds, "Antipsychotics in Veterans with Dementia: Is There Increased Risk of Mortality?", Ann Arbor MI, September 6, 2005.
7. HSRD Working Seminar, "Antipsychotics in Veterans with Dementia: Is There Increased Risk of Mortality?", Ann Arbor MI, December 1, 2005.
8. Community Forum Series "Bright Nights", UM Women's Health Program and UM Depression Center, "Women's Health and Depression", Ann Arbor District Library, Ann Arbor MI, April 3, 2007.

9. First Congregational Church, "Late-life Depression", Rochester Michigan, April 26, 2007.
10. Depression and Bipolar Support Alliance Metro Detroit, Annual Conference, "Impact of Race on the Diagnosis and Treatment of Depression", October 27, 2007.
11. Chelsea Retirement Community, "Later-Life Depression," Chelsea MI, April 14, 2008.
12. Chelsea Adult Learners Institute, *Brain Health and Fitness Workshop*, "Strategies for Positive Aging: Improving Mood", Chelsea MI, February 5, 2009.
13. Ann Arbor Public Library, *Positive Aging: Strategies for Growing Older*, "Strategies for Positive Aging: Improving Mood and Memory", Ann Arbor MI, May 5, 2009.
14. Washtenaw County Blueprint for Aging, "Side Effects and Drug Interactions Associated with Mental Health and Aging: What to look for with new conditions and prescriptions", Ann Arbor MI, June 17, 2009.
15. VA HSRD Working Seminar, Ann Arbor MI, "Antipsychotics and Mortality", April 22, 2010.
16. Michigan Psychiatric Society Annual Meeting, "Antipsychotics and Mortality", Ypsilanti MI, April 30, 2010.
17. VISN 11 Healthcare Network, *Meeting the Challenge: Palliative Care for Veterans with Dementia and Advanced Neurological Diseases*, "Treating the Neuropsychiatric Symptoms of Dementia in the Palliative Care Setting", Ann Arbor MI, August 23, 2011.
18. Chelsea Hospital Department of Psychiatry, "Treating the Neuropsychiatric Symptoms of Dementia", Chelsea MI, October 6, 2011.
19. Osher Life-Long Learning Institute, "Making the Most of What You've Got: The Path to Positive Aging", Ann Arbor MI, March 8, 2012.
20. Wayne State University/Detroit VA, "Antipsychotics and the Elderly: The Good, the Bad and the Ugly, Detroit MI, January 30, 2013.
21. Wayne State University Institute of Gerontology Conference, *Issues in Aging: Contemporary Approaches in Alzheimer's/Dementia Care*, "Managing the Behavioral Symptoms of Dementia Using the DICE Approach vs. Rolling the Dice with Usual Care", Dearborn MI, May 13, 2013.

22. Alzheimer's Association/Michigan Alzheimer's Disease Center Research Night, "Managing the Neuropsychiatric Symptoms of Dementia", Ann Arbor, MI, November 21, 2013
23. St. Joseph Hospital Department of Psychiatry Grand Rounds, "Antipsychotics and Mortality in the Elderly: The Good, the Bad and the Ugly", Ann Arbor MI, May 21, 2014.
24. Huron High School AP Biology Class, "Research on Behavioral Symptoms of Dementia: How I got here and where am I going", Ann Arbor MI, March 24, 2015.
25. VA GRECC Interdisciplinary Research Conference, "Addressing Behavioral Symptoms of Dementia: The DICE Approach and the WeCareAdvisor", April 9, 2015.
26. Silverman Conference, University of Michigan Department of Psychiatry, "Assessing and Managing Behavioral Symptoms of Dementia: Is there a better way?", April 27, 2016.
27. Spectrum Health Medical Group, *2016 Psychiatry and Behavioral Medicine Symposium*, Keynote Talk, "Managing Behavioral and Psychological Symptoms of Dementia: Is there a better way?", Grand Rapids MI, October 18, 2016.
28. Henry Ford Department of Psychiatry, Grand Rounds, "Managing Behavioral and Psychological Symptoms of Dementia: Is there a better way?", Detroit MI, December 8, 2016.
29. Michigan Mental Health and Aging Conference, "We Already Do All That!: Shifting the Paradigm of Managing Behavioral and Psychological Symptoms of Dementia", East Lansing MI, May 16, 2017.
30. Aging Innovations Forum, Area Agency on Aging 1-B, "The DICE Approach", Ann Arbor, Michigan, July 27, 2017.

#### National/International

1. Plenary Presentation, VA Health Services Research and Development Service National Meeting, "Race and Primary Care Physician Diagnosis/Treatment of Geriatric Depression", Washington, D.C., March 2004.
2. National Institutes of Health, National Institute of Mental Health, NIMH Workgroup on Adherence to Interventions for Mental Disorders, "Racial Issues in Depression and Mental Health Treatment Adherence", Bethesda, Maryland, May 15, 2006.

3. University of Pennsylvania/Philadelphia VAMC, "Quality Depression Care for the Older Veteran", Philadelphia, Pennsylvania, May 16, 2007.
4. National Institutes of Health, National Institute of Mental Health, New Clinical Drug Evaluation Unit (NCDEU) Meeting, "Mortality Risk in Patients with Dementia Treated with Antipsychotics versus Other Psychiatric Medications", Boca Raton, Florida, June 12, 2007.
5. Wake Forest University Department of Psychiatry, "Late-Life Depression Care Adherence", Winston-Salem, North Carolina, June 18, 2007.
6. NIMH-sponsored national teleconference, MedEd Mentoring, "Career Opportunities for Later-life Mental Health Research in the VA", November 6, 2007.
7. NIMH Conference "Challenges in Recruitment and Retention in Geriatric Mental Health Research", Panel Co-Chair, Potomac, Maryland, December 1-2, 2007.
8. University of Alabama Department of Psychiatry Grand Rounds, "Impact of Race on the Diagnosis and Treatment of Depression", Birmingham, Alabama, February 5, 2008.
9. NIMH Summer Research Institute in Geriatric Psychiatry, "Work/Life Balance", Philadelphia, Pennsylvania, July 21, 2008.
10. NIMH Summer Research Institute in Geriatric Psychiatry, "Life and Work in the VA System", Philadelphia, Pennsylvania, July 21, 2008.
11. NIMH Summer Research Institute in Geriatric Psychiatry, "Relationships: An Unspoken Key to a Successful Research Career", Ann Arbor, Michigan, July 27, 2009.
12. University of Pittsburgh Department of Psychiatry Grand Rounds, "Where the Rubber Meets the Road: A View from Later-life Mental Health Services", Pittsburgh, Pennsylvania, September 11, 2009.
13. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *In the Wake of the Black Box Warning, Where do we go from here with behavioral disturbances in dementia?*, "Antipsychotics and Mortality", Savannah, Georgia, March 5, 2010.
14. American Association for Geriatric Psychiatry Professional Development Conference, Keynote presentation, "Beyond Later-Life Depression: The Next Generation of Diagnosis and Management", Santa Monica, California, November 12, 2010.

15. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *Emerging from Between a Rock and a Hard Place: Treating the Neuropsychiatric Symptoms of Dementia*, “Setting the Stage”, San Antonio, Texas, March 19, 2011.
16. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *Psychopharmacology in Older Adults: Safety, Risk and Opportunities*, “Examining the Link between Antipsychotics and Mortality in VA National Data” (presentation) as well as Invited Discussant, San Antonio, Texas, March 19, 2011.
17. Weill-Cornell Medical College, Institute of Geriatric Psychiatry, “The Black Box Warning and Other Disappointments: Where Do We Go from Here with Managing the Neuropsychiatric Symptoms of Dementia?”, White Plains, New York, January 30, 2012.
18. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *Antipsychotic Use in Dementia: Is the Devil in the Details?* “Trends and Modifiers of Antipsychotic Use in Dementia, Washington, D.C., March 17, 2012.
19. Johns Hopkins University Neuropsychiatry Program, “Between Scylla and Charybdis: The Use of Antipsychotics for the Neuropsychiatric Symptoms of Dementia”, Baltimore, Maryland, May 25, 2012.
20. Alzheimer’s Association International Conference, Featured Research Symposium, *Tackling Overlap of Neuropsychiatric Symptoms in Alzheimer’s and Other Dementias: Toward a Unified Approach to Evaluation and Treatment*, “The 6D Approach for the Evaluation and Management of Neuropsychiatric Symptoms of Dementia”, Vancouver, British Columbia, July 15, 2012.
21. VA Health Services Research and Development Service National Meeting, “Determinants of Antidepressant Adherence among Older Veterans”, National Harbor, Maryland, July 19, 2012.
22. Northeast Ohio Medical University/Akron General Medical Center Psychiatry Grand Rounds, “Antipsychotics and Mortality: Between Scylla and Charybdis”, Akron, Ohio, September 27, 2012.
23. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *Treating Behavioral and Psychological Symptoms in AD and Dementia: A Trans-Atlantic Workshop*. An Approach to the Evaluation and Management of Behavioral Symptoms of Dementia, Los Angeles, California, March 16, 2013.
24. NIMH-sponsored Advanced Research Institute in Geriatric Psychiatry, “Career Strategies”, with Yeates Conwell MD, Graylyn, North Carolina, April 6, 2013.



25. Pennsylvania State University College of Medicine, Department of Psychiatry Resident Lecture, "Later-Life Depression, Dementia, and Positive Aging", Hershey, Pennsylvania, June 27, 2013.
26. Pennsylvania State University College of Medicine, Department of Psychiatry Grand Rounds, "Managing the Neuropsychiatric Symptoms of Dementia: Rolling the Dice with Usual Care vs. the Interdisciplinary DICE Approach", Hershey, Pennsylvania, June 27, 2013.
27. Alzheimer's Association International Conference, Pre-Conference Primary Care Symposium, *Alzheimer's Disease in Primary Care Settings*, "The Front Lines: A Nonpharmacological Approach to Neuropsychiatric Symptoms and Problem Behaviors in Dementia", Boston, Massachusetts, July 13, 2013.
28. Orthodox Christian Association for Medicine, Psychology and Religion, *Clinical and Pastoral Care for the Aging Patient*, "Later-life Depression, Dementia and Positive Aging", Falls Church, Virginia, November 2, 2013.
29. American Psychiatry Association Annual Meeting, Invited Symposium, "The DICE Approach: A Method to Assess and Manage the Neuropsychiatric Symptoms of Dementia", New York, New York, May 4, 2014.
30. Harvard Medical School, Continuing Education Course, *Dementia: A Comprehensive Update*, "Increasing Uptake of Non-Pharmacological Approaches to Assess and Manage the Neuropsychiatric Symptoms of Dementia", Boston, Massachusetts, May 30, 2014.
31. King's College London, Wolfson Centre for Age-Related Diseases, "Increasing Uptake of Non-Pharmacological Approaches to Assess and Manage the Neuropsychiatric Symptoms of Dementia", London, England, July 1, 2014.
32. Trinity College, St. James Hospital, "Increasing Uptake of Non-Pharmacological Approaches to Assess and Manage the Neuropsychiatric Symptoms of Dementia", Dublin, Ireland, July 10, 2014.
33. Center for Medicaid and Medicare Services Grand Rounds, "The Elephant in the Room: Neuropsychiatric Symptoms of Dementia", Baltimore, MD, September 9, 2014.
34. International College of Geriatric Neuropsychopharmacology, Invited Symposium, "Assessment and Management of Neuropsychiatric Symptoms of Dementia: The need for a targeted and tailored approach", Tsukuba, Japan, October 3, 2014.
35. American Society on Aging, *Invited Webinar with Dr. Laura Gitlin*, "The Time is Now to Address Behavioral Symptoms of Dementia", with over 650 attendees online, February 5, 2015.

36. Riverside Healthcare, “The Time is Now to Address Behavioral Symptoms of Dementia”, Kankakee, IL, March 11, 2015.
37. Northeast Ohio Medical University, Department of Psychiatry Grand Rounds, “Non-pharmacologic Approaches to Neuropsychiatric Symptoms and Problem Behaviors in Dementia”, Akron, Ohio, April 23, 2015.
38. Harvard Medical School, *Continuing Education Course, Dementia: A Comprehensive Update*, “Non-pharmacologic Approaches to Neuropsychiatric Symptoms and Problem Behaviors in Dementia”, Boston, Massachusetts, May 29, 2015.
39. International Psychogeriatric Association, Invited Symposium, “The DICE Approach and the WeCareAdvisor: Tools to Assess and Manage BPSD”, Berlin, Germany, October 14, 2015.
40. BrightFocus Foundation, *Expert Consensus Panel on Accelerating the Development, Testing and Dissemination of Home-based Dementia Care Inventions* (with Laura Gitlin PhD), “Current Status of Home-based Dementia Care Research”, Baltimore, Maryland, December 8, 2015.
41. Lancet Global Commission on Dementia Care, “The Role of Technology in Dementia Care”, London, England, January 12, 2016.
42. University of Southern California, “Behavioral and Psychological Symptoms of Dementia: How do we address the elephant in the room?”, Pasadena, California, January 27, 2016.
43. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *Taming the Elephant in the Room: Interventions for Improving Dementia Care Using Technology: WeCareAdvisor™: A tool to assist caregivers in managing the behavioral symptoms of dementia*, Washington, D.C., March 18, 2016.
44. VA Psychotropic Drug Safety Initiative (PDSI) National Quality Improvement Collaborative Group, “Managing Behavioral and Psychological Symptoms of Dementia: Is there a better way?”, National Teleconference presentation, April 7, 2016.
45. Bowling Green State University/University of Toledo Regional Psychology/Psychiatry Conference, Keynote lecture, “Managing Behavioral and Psychological Symptoms of Dementia: Is there a better way?”, Toledo, Ohio, April 28, 2016.

46. Harvard Medical School, Continuing Education Course, *Dementia: A Comprehensive Update*, “Managing Behavioral and Psychological Symptoms of Dementia: Is there a better way?”, Boston, Massachusetts, June 10, 2016.
47. Alzheimer’s Association International Conference, Featured Research Session (Bright Focus Foundation National Expert Panel), *Accelerating the Development, Testing and Dissemination of Home Based Dementia Care Interventions*, “WeCareAdvisor™: A clinical trial of a caregiver-focused, web-based algorithm to assess and manage BPSD”, Toronto, Canada, July 18, 2016.
48. Council for the Advancement of Nursing Science, *Determinants of Behavioral and Psychological Symptoms of Dementia*, “Psychosis”, Washington, DC, September 15, 2016.
49. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *Maximizing Independence at Home” for people with dementia and their caregivers*, The DICE Approach: Application to family caregivers in the home setting, Dallas, Texas, March 25, 2017.
50. American Association for Geriatric Psychiatry Annual Meeting, Symposium, *The WeCareAdvisor™: A web-based tool to help family caregivers manage the behavioral and psychological symptoms of dementia*, Effect of the WeCareAdvisor on family caregiver outcomes: a pilot randomized controlled trial, preliminary trial results. Dallas, Texas, March 27, 2017.
51. NIMH/NIA Novel Approaches to Understanding the Mechanisms of the Neuropsychiatric Symptoms in Alzheimer’s and Advancing Therapy Development Workshop: *Conceptual Model of NPS in Dementia*. Bethesda, MD, May 8, 2017.
52. Harvard Medical School, Continuing Education Course, *Dementia: A Comprehensive Update*, “We Already Do All That!: Shifting the Paradigm of Managing Behavioral and Psychological Symptoms of Dementia”, Boston, Massachusetts, June 9, 2017.
53. Alzheimer’s Association International Conference, “WeCareAdvisor: A Randomized Controlled Trial to Test and Innovative and Caregiver-Focused Tool for the Assessment and Management of BPSD”, London, England, July 16, 2017.
54. Alzheimer’s Association International Conference, *The Lancet Commission on Dementia Prevention, Intervention and Care*, Expert Commentary, London, England, July 20, 2017.
55. Escitalopram for Agitation in Alzheimer’s Disease (S-CitAD) Training Meeting, “The DICE Approach”, Baltimore, Maryland, September 7, 2017.

56. National Research Summit on Dementia Care and Services, “Causality Matters: Preventing and Mitigating the Behavioral Symptoms of Dementia”, Bethesda, Maryland, October 16, 2017.

## **PATENT AND DISCLOSURE**

1. The WeCareAdvisor™ has an invention disclosure submitted to the University of Michigan Office of Technology Transfer (May 2015). The intellectual property is split three ways between the co-Inventors (Kales, Gitlin and Lyketsos), and there is an inter-institutional agreement between Johns Hopkins and the University of Michigan. The IP is covered by copyright protection, and the names WeCareAdvisor™, DICE Approach™, and Caregiver Survival Guide™ are currently covered under common law trademark.
2. The DICE Approach™ has an invention disclosure submitted to the University of Michigan Office of Technology Transfer (June 2017). The intellectual property is split three ways between the co-Inventors (Kales, Gitlin and Lyketsos), and there is an inter-institutional agreement between Johns Hopkins and the University of Michigan. The IP is covered by copyright protection.

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### *Peer-Reviewed Publications*

1. Mattison RE, Handford HA, Kales HC, Goodman AL: Four-year predictive value of the Children's Depression Inventory. *Psychological Assessment* 2(2): 169-174, 1990.
2. Mattison RE, Lynch JC, Kales HC, Gamble AD: Checklist identification of elementary schoolboys for clinical referral or SED evaluation. *Behavioral Disorders* 18(3): 218-227, 1993.
3. Kales HC, Raz J, Tandon R, Maixner D, DeQuardo J, Miller A, Becks L: Relationship of seizure duration to antidepressant efficacy in electroconvulsive therapy. *Psychological Medicine* 27: 1373-1380, 1997.
4. Valenstein M, Kales HC, Mellow AM, Dalack G, Figueroa S, Barry KL, Blow FC: Psychiatric diagnosis and intervention in older and younger adult patients in a primary care clinic: effect of a screening and diagnostic instrument. *The Journal of the American Geriatrics Society* 46: 1499-1505, 1998.

5. Kales HC, Blow FC, Copeland LC, Bingham CR, Kammerer EE, Mellow AM: Health care utilization by older patients with coexisting dementia and depression. *The American Journal of Psychiatry* 156: 550-556, 1999.
6. Kales HC, DeQuardo JR, Tandon R: Combined electroconvulsive therapy and clozapine in treatment-resistant schizophrenia, *Progress in Neuro-psychopharmacology and Biological Psychiatry*, 23: 547-556, 1999.
7. Kales HC, Blow FC, Bingham CR, Copeland LC, Mellow AM: Race and inpatient psychiatric diagnoses among elderly veterans. *Psychiatric Services* 51: 795-800, 2000.
8. Kales HC, Blow FC, Bingham CR, Roberts JS, Copeland LC, Mellow AM: Race, psychiatric diagnosis and mental health care utilization in older patients. *The American Journal of Geriatric Psychiatry* 8: 301-309, 2000.
9. Kales HC, Blow FC: Health services research on late-life mental disorders: the emerging translation from clinical science to improved outcomes. *The Journal of Geriatric Psychiatry and Neurology* 15: 119-120, 2002.
10. Kales HC, Valenstein M: Complexity in late-life depression: Impact of confounding factors on diagnosis, treatment, and outcomes. *The Journal of Geriatric Psychiatry and Neurology* 15: 147-155, 2002.
11. Kales HC, Kamholz BA, Visnic SG, Blow FC: Recorded delirium in a national sample of elderly inpatients: Potential implications for recognition. *The Journal of Geriatric Psychiatry and Neurology* 16: 32-38, 2003.
12. Kales HC, Blow FC, Welsh DE, Mellow AM: Herbal products and other supplements: Use by elderly veterans with depression and dementia and their caregivers. *The Journal of Geriatric Psychiatry and Neurology* 17: 25-31, 2004.
13. Valenstein M, Taylor KK, Austin K, Kales HC, McCarthy JF, Blow FC: Benzodiazepine use among depressed patients treated in mental health settings. *The American Journal of Psychiatry* 161: 654-661, 2004.
14. Sajatovic M, Blow FC, Ignacio RV, Kales HC: Age-related modifiers of clinical presentation and health service use among veterans with bipolar disorder. *Psychiatric Services* 55: 1014-1021, 2004.
15. McCarthy JF, Blow FC, Kales HC: Disruptive behaviors in Veterans Affairs nursing home residents: How different are residents with serious mental illness? *Journal of the American Geriatrics Society* 52: 2031-2038, 2004.
16. Kales HC, Maixner DF, Mellow AM: Cerebrovascular disease and late-life depression. *The American Journal of Geriatric Psychiatry* 13: 88-98, 2005.

17. Sajatovic M, Blow FC, Ignacio RV, Kales HC: New-onset bipolar disorder in later life. *The American Journal of Geriatric Psychiatry* 13: 282-289, 2005.
18. Kales HC, Neighbors HW, Valenstein M, Blow FC, McCarthy JF, Ignacio RV, Taylor KK, Gillon L, Mellow AM: Effect of race and sex on primary care physicians' diagnosis and treatment of late-life depression. *Journal of the American Geriatrics Society* 53: 777-784, 2005.
19. Kales HC, Neighbors HW, Blow FC, Taylor KK, Gillon L, Welsh DE, Maixner SM, Mellow AM: Race, gender, and psychiatrists' diagnosis and treatment of major depression among elderly patients. *Psychiatric Services* 56: 721-728, 2005.
20. Kales HC, Chen P, Blow FC, Welsh DE, Mellow AM: Rates of clinical depression diagnosis, functional impairment and nursing home placement in coexisting dementia and depression. *The American Journal of Geriatric Psychiatry* 13: 441-449, 2005.
21. Sajatovic M, Kales HC: Diagnosis and management of bipolar disorder with comorbid anxiety in the elderly. *Journal of Clinical Psychiatry* 67S1: 21-27, 2006.
22. Kales HC, DiNardo AR, Blow FC, McCarthy JF, Ignacio RV, Riba MB: International medical graduates and the diagnosis and treatment of late-life depression. *Academic Medicine* 81: 171-175, 2006.
23. Kales HC, Mellow AM: Race and depression: Does race affect the diagnosis and treatment of late-life depression? *Geriatrics* 61: 18-21, 2006.
24. Chen P, Kales HC, Weintraub D, Blow FC, Jiang L, Mellow AM: Depression in veterans with Parkinson's disease: frequency, comorbidity and healthcare utilization. *International Journal of Geriatric Psychiatry* 22: 543-548, 2007. PMC 2000482
25. Chen P, Kales HC, Weintraub D, Blow FC, Jiang L, Mellow AM: Antidepressant treatment of veterans with Parkinson's disease and depression: analysis of a national sample. *Journal of Geriatric Psychiatry and Neurology* 20: 161-165, 2007. PMC 2001165
26. Sajatovic M, Blow FC, Kales HC, Valenstein M, Ganoczy D, Ignacio RV: Age comparison of treatment adherence with antipsychotic medications among individuals with bipolar disorder. *International Journal of Geriatric Psychiatry* 22: 992-998, 2007.
27. Kales HC, Valenstein M, Kim HM, McCarthy JF, Ganoczy D, Blow FC: Mortality risk in patients with dementia treated with antipsychotics versus other psychiatric medications. *The American Journal of Psychiatry* 164: 1568-1576, 2007.

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30. Kales HC: New use of antipsychotic drugs in elderly people with dementia may increase mortality risk. (invited commentary). *Evidence Based Mental Health* 11(2):54, 2008.
31. Zivin K, McCammon RJ, Davis MM, Halasyamani LK, Kales HC: Increases in Medicare prescription drug plan costs attributable to psychotropic medications. *The American Journal of Geriatric Psychiatry* 16(8):674-85, 2008.
32. McCarthy JF, Zivin K, Austin KL, Kales HC, Valenstein M: Does Consideration of Medicare Use Affect VA Evaluations of Depression Treatment Quality? *Administration and Policy in Mental Health and Mental Health Services Research* 35(6):468-76, 2008.
33. Zivin K, Kabeto MU, Kales HC, Langa KM. The effect of depression and cognitive impairment on enrollment in Medicare Part D. *Journal of the American Geriatrics Society* 57(8):1433-40, 2009. PMC 2810264
34. Seyfried LS, Hanauer D, Nease D, Albeiruti R, Kavanagh J, Kales H: Enhanced identification of eligibility for depression research using an electronic medical record search engine. *International Journal of Medical Informatics* 78(12)13-18, 2009. PMC 2784251
35. Kales HC, Blazek M, Maixner S, Struble L. Antipsychotic use in the elderly: overview and evidence-based management. *Journal of Clinical Outcomes Management* 17(1):37-46, 2010.
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37. Kales HC, Kim HM, Austin KL, Valenstein M: Who receives outpatient monitoring during high-risk depression treatment periods? *Journal of the American Geriatrics Society* 58(5):908-13. PMC 2928165
38. Sirey J, Bruce ML, Kales HC: Improving Antidepressant Adherence and Depression Outcomes Among Older Adults: The Treatment Initiation and Participation Program. *American Journal of Geriatric Psychiatry* 18(6):554-562, 2010.

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40. Maixner S, Struble L, Blazek M, Kales HC: Later-life depression and heart failure. *Heart Failure Clinics* 7(1):47-58, 2011.
41. Kales HC, Zivin K, Kim HM, Valenstein M, Chiang C, Ignacio R, Ganoczy D, Cunningham F, Schneider L, Blow FC: Trends in antipsychotic use in dementia 1999-2007. *Archives of General Psychiatry* 68(2): 190-197, 2011.
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