

HYBRID EVENT

# Transparency & Aggregate Spend

**IN-PERSON:**  
**DECEMBER 6-7**  
 HILTON PHILADELPHIA AT PENN'S LANDING  
 PHILADELPHIA, PA

**VIRTUAL:**  
**DECEMBER 9-10**

**Critical Exchange and Collaboration for Optimizing Transparency Reporting, Mitigating Risk and Enhancing Operations**

RENOWNED INDUSTRY EXPERTS TACKLING TRANSPARENCY REPORTING TRENDS:



**Bill Aprea**  
 Head of Healthcare Compliance  
**PHATHOM PHARMACEUTICALS**



**Melissa Blaco**  
 Senior Director, Compliance Reporting  
**REGENERON PHARMACEUTICALS**



**Tammy Brintzinghoffer**  
 Director, Global Transparency Reporting  
**JOHNSON & JOHNSON**



**Loretta van der Bie,**  
 Senior Director, Global Ethics and Compliance,  
**EDWARDS LIFESCIENCES**



**Joseph Mack**  
 Senior Assistant General Counsel, Compliance and Investigations  
**BAYER**



**Jennifer Parsons**  
 Director, U.S. Transparency and Compliance Operations  
**BIOPEN**



**Amie Phillips Pablo**  
 Director, Ethics and Compliance  
**NOVO NORDISK**



**Brian Sharkey**  
 Director, Compliance, U.S. Commercial  
**TEVA PHARMACEUTICALS**

CAN'T-MISS CONFERENCE HIGHLIGHTS AND FEATURES INCLUDE:



**SUNSHINE ACT ENFORCEMENT ON WATCH:**  
 DOJ Reflection on Recent Open Payments Settlements



**CMS TOWN HALL:**  
 First-Hand Guidance for Effective Reporting Preparations



**SUNSHINE ACT SHOWCASE:**  
 Preparing for the Future of Open Payments – Sunshine Act Expansion, New Nature of Payment Categories and Final Rule Considerations

2020 and 2021 have raised unprecedented challenges across our personal and professional lives. Through incredible collaboration among our life sciences colleagues developing COVID-19 vaccines, we are finally able to safely unite, in-person, December 6-7 at **Transparency & Aggregate Spend**. With that, we recognize there are many reasons that may contribute to not being able to attend in-person just yet. Keeping that in mind, we are pleased to present **Transparency & Aggregate Spend** in a unique hybrid format. Whether you're planning to attend in-person or virtually, we have a content-rich program to accommodate you.



## ALL ACCESS EXPERIENCE

**IN-PERSON: December 6-7 | Philadelphia, PA**

**VIRTUAL: December 9-10**

After more than a year apart, unite with industry peers at this two day in-person event offering keynote presentations and comprehensive panel discussions. Enjoy networking, benchmarking and idea sharing face-to-face to improve transparency reporting operations.

- Two full days of face-to-face content from industry thought-leaders
- Tailored summits by experience level: Choose between the Beginner's Bootcamp or Closed-Door Summit for Seasoned Experts
- Interactive forum for benchmarking, Q&A and best practice sharing
- In-person networking with colleagues and industry counterparts
- Networking wine and cheese reception
- Full access to the virtual experience



## VIRTUAL EXPERIENCE

**December 9-10**

Following the in-person offering, benefit from two days of new virtual content and recorded replays from the face-to-face event, along with virtual networking and connecting.

- Two days comprised of new live content and re-broadcasted, curated recordings from the face-to-face component
- On-demand library including recordings of in-person sessions and available slide decks, with access up to 30-days at the close of the event
- Event platform with dynamic features, including attendee and company profiles, advanced search capabilities to identify opportunities and potential partners, easy-to-use technology to enable virtual networking, seamless scheduling tools to establish meeting times

**Transparency & Aggregate Spend** is the leading event for life sciences manufacturers to keep up to date on current and future trends in the ever-evolving transparency landscape. This robust, must-attend event features essential dialogue on topics of Sunshine Act expansion, enforcement trends, virtual HCP interactions, global transparency, data analytics and much more through hard-hitting keynotes and panel discussions. Benefit from the opportunity to create a customizable experience with tailored benchmarking by company size, type and by seniority level. Unite for key learnings and network with colleagues face-to-face or virtually at this unique, all access event.

## Industry Praise for Transparency & Aggregate Spend



“This event is always a “must attend” – But this year, they hit it even further out of the park! I appreciated that there weren’t multiple sessions held at the same time (for the most part.) For those sessions that were concurrent, it was very hard to choose just one. The speakers were terrific, the panels gave timely information and there were too many useful take-aways to count.”



“Great bandwidth of topics and resources. Speakers were interesting, and the poll results were very helpful to gauge where our company is in relation to others.”



“Great opportunity to learn from industry leaders while sharing best practices and connecting with peers from all over the country.”

## WE ASKED: YOU ANSWERED

**IN REGARD TO THE SUNSHINE ACT EXPANSION, WHICH AREA(S) CAUSE THE MOST UNCERTAINTY ?**



Tracking of Newly Covered Recipients (2021)



Impact on State Law Transparency Reporting (2022)



Reporting the Data (2022)



Review and Dispute Period (2022)



Data Publication (2022)



\*Collected responses via the 2021 Transparency & Aggregate Spend: Spring Reporting Review pre-conference benchmarking survey



## DAY ONE (IN-PERSON): MONDAY, DECEMBER 6, 2021

7:00-8:15 AM

CONFERENCE REGISTRATION AND CONTINENTAL BREAKFAST

8:15-8:30 AM

### Informa Connect Welcome and Conference Co-Chairs' Opening Remarks

*John Oroho, Executive Vice President and Chief Strategy Officer, Porzio Life Sciences LLC*  
*Neal Rafferty, Senior Director, Compliance Officer – North America, Merz Aesthetics*  
*Katie Laquidara, Senior Conference Producer, Informa Connect*

8:30-9:15 AM

### Sunshine Act Enforcement on Watch: DOJ Reflection on Recent Open Payments Settlements

- Analyze recent Sunshine Act violations and benefit from regulatory insights to avoid facing similar situations
- Hear guidance to compliantly navigate transparency reporting
- Discover key trends and considerations to be aware of from an enforcement perspective
- Keep a pulse on proposed legislations and the potential impact on open payments

*Moderator: Tim Robinson, Chief Legal and Privacy Officer, MediSpend*

*Panelists: Charlene Fullmer, Assistant United States Attorney, Deputy Chief, Affirmation Litigation, U.S. Department of Justice*  
*David Walk, Assistant United States Attorney, U.S. Department of Justice*

9:15-10:00 AM

### HCP Engagement & Transparency: Best Practices for Managing Risk and Avoiding Enforcement Action

- Discuss the importance of monitoring the enforcement landscape to assess your company risk
- Determine creative ways to utilize data analytics to spot outliers and maintain internal best practices
- Learn how to proactively identify potential pitfalls in your HCP engagement and transparency process

*Audrey DeGuarde, Associate Vice President, Global Transparency, Porzio Life Sciences, LLC*

*Isha Arora, Director, Compliance Technology, Porzio Life Sciences, LLC*

*Jennifer Romanski, Vice President, Porzio Life Sciences, LLC*

*Michael Varlotta, Senior Director, Commercial Operations, Johnson & Johnson*

10:00-10:30 AM

NETWORKING AND REFRESHMENT BREAK

10:30 AM-12:00 PM

### SUNSHINE ACT SHOWCASE

*Preparing for the Future of Open Payments: Sunshine Act Expansion, New Nature of Payment Categories and Final Rule Considerations*

#### I. Optimize Operational Processes to Execute Upon Sunshine Act Expansion

- Evaluate challenges in tracking activities of covered recipients in 2021
- Assess concerns for 2021 data submissions and strategies to overcome obstacles
- Hear preparations for the upcoming review and dispute period
- Consider outcomes and potential implications of published 2021 data

#### II. Prepare for New Nature of Payment Categories

- Hear steps taken for reporting in the new categories of debt forgiveness, long term medical supply or device loan and acquisitions
- Highlight key considerations for accurately reporting data within the new stand-alone payment buckets

#### III. Determine the Impact of Proposed Changes to the Open Payments Rule

*Moderator: Brian Bohnenkamp, Partner, FDA and Life Sciences, King & Spalding LLP*

*Panelists: Tammy Brintzinghoffer, Director, Global Transparency Reporting, Johnson & Johnson*

*Susan Hibbard, Associate Director, Transparency, Office of Ethics and Compliance, Boehringer Ingelheim*

|               |  |  |
|---------------|--|--|
| 12:00-1:00 PM | <b>NETWORKING LUNCHEON</b>   |  |
| 1:00-1:45 PM  | <p><b>Deep-Dive into State Representative Registration Considerations</b></p> <ul style="list-style-type: none"> <li>• Hear a comprehensive overview of state representative registration requirements</li> <li>• Discuss the current status of the Oregon Representative Licensure Bill</li> <li>• Consider operational processes for maintaining compliance with registration requirements</li> </ul> <p><i>Amie Phillips Pablo, Director, Ethics and Compliance, <b>Novo Nordisk</b></i><br/> <i>Melissa Blaco, Senior Director, Compliance Reporting, <b>Regeneron Pharmaceuticals</b></i></p>   |  |
| 1:45-2:30 PM  | <p><b>Navigate the Dynamic Nature of Global Transparency Reporting</b></p> <ul style="list-style-type: none"> <li>• Stay on top of the rapidly changing regulations in the global transparency reporting landscape</li> <li>• Adhere to geographic regions varying requirements on what is considered a covered recipient and what is considered reportable</li> <li>• Decipher evolving rules, laws and codes for compliant country reporting</li> </ul> <p><i>Terra Buckley, Vice President, Head of Compliance Advisory Services, <b>MedPro Systems</b></i><br/> <i>Melissa Ince, Director, Global Transparency Reporting, <b>Abbot Laboratories</b></i><br/> <i>Melissa LaFrain, Director, Global Transparency Operations, <b>AstraZeneca</b></i></p>  |  |
| 2:30-3:15 PM  | <p><b>Review Approaches to Speaker Programs as a Result of the OIG Special Fraud Alert</b></p> <ul style="list-style-type: none"> <li>• Operationalize details to pursue effective and compliant speaker programs</li> <li>• Consider various decisions organizations are making to align with OIG guidance</li> <li>• Contemplate the future of promotional activities in a post-COVID world</li> <li>• Assess possible changes with additional policies and guidance in a shifting regulatory environment</li> </ul> <p><i>Moderator: Russ West, Senior Vice President, Data Integration and Data Analytics, <b>HealthSTAR Strategic Engagements</b></i><br/> <i>Panelists: Loretta van der Bie, Senior Director, Global Ethics and Compliance, <b>Edwards Lifesciences</b></i><br/> <i>Joseph Mack, Senior Assistant General Counsel, Compliance and Investigations, <b>Bayer</b></i><br/> <i>Bill Aprea, Head of Healthcare Compliance, <b>Phathom Pharmaceuticals</b></i></p> |  |
| 3:15-3:45 PM  | <b>NETWORKING AND REFRESHMENT BREAK</b>  |  |
| 3:45-5:00 PM  | <b>TAILORED SUMMITS BY EXPERIENCE LEVEL</b>  |  |
|               | <p><b>A. Beginner’s Bootcamp: Open Payments 101</b></p> <p>Whether you are new to your role in transparency and aggregate spend, need a refresher, or just want to bring it back to basics, this is the essential session for you! Leaders in transparency reporting will provide a critical overview of operations, compliance considerations, and more on the fundamentals of Open Payments. This collaborative, engagement-focused session will enhance your understanding of reporting nuances to prepare you for accurately reporting transfers of value.</p> <p><i>Facilitators:</i><br/> <i>Kelly Tope, USBU Ethics &amp; Compliance, Lead: Monitoring, Transparency, &amp; Samples, <b>Takeda</b></i><br/> <i>Chelsea Ott, Associate Director, MedPro Compliance Advisory Services, <b>MedPro Systems</b></i><br/> <i>Jeffrey Carter, Manager, Global Spend Transparency, <b>Vertex Pharmaceuticals</b></i></p>  | <p><b>B. Closed-Door Summit for Seasoned Experts**</b></p> <p>Connect with fellow transparency reporting experts to share experiences and benchmark common challenges. With a specific survey conducted prior to the meeting, attendees will level-set their experiences and share top-of-mind pain points and areas of interest. Facilitators will prepare key topics of discussion and carefully review survey insights to tailor the dialogue. Take part in this critical, interactive knowledge-exchange in an open, collaborative format.</p> <p><i>**This summit is an exclusive, senior-level benchmarking discussion. Attendees should have a minimum of 5 years experience in transparency and aggregate spend at a bio/pharmaceutical or medical device company. Informa Connect reserves the right to qualify participants for this Summit. All other delegates will attend the Beginner’s Bootcamp session during this time. Please email <a href="mailto:juliet.nelson@informa.com">juliet.nelson@informa.com</a> to reserve your seat.</i></p> <p><i>Facilitators:</i><br/> <i>Melissa Blaco, Senior Director, Compliance Reporting, <b>Regeneron Pharmaceuticals</b></i><br/> <i>Jennifer Parsons, Director, U.S. Transparency &amp; Compliance Operations, <b>Biogen</b></i></p> |
| 5:00-6:00 PM  | <b>NETWORKING RECEPTION</b>  |  |



## DAY TWO (IN-PERSON): TUESDAY, DECEMBER 7, 2021

8:00-8:45 AM

### BREAKFAST SPOTLIGHT SESSION: Diversity, Equity and Inclusion Summit **INCLUSION**

Diversity, Equity & Inclusion Series

Benefit from a personal development Summit by hearing real-life experiences of others' successes and challenges, in an inspiring and interactive session, with a focus on how we can build a more diverse and inclusive culture.

- Take action, be accountable, and lead intentionally with inclusion
- Create a culture that emphasizes the importance of diversity and inclusion
- Put forth innovative efforts to drive empowerment enterprise-wide
- Uncover leadership strategies to advance change

Panelists:

Jessica Colon, Vice President, Deputy Compliance Officer, **Indivior**

Sujata Dayal, Vice President and Chief Compliance Officer, **Medline Industries**

8:45-8:50 AM

### Conference Co-Chairs' Review of Day One

John Oroho, Executive Vice President and Chief Strategy Officer, **Porzio Life Sciences LLC**

Neal Rafferty, Senior Director, Compliance Officer – North America, **Merz Aesthetics**

8:50-9:35 AM

### Evaluate Proposed Requirement to Inform Patients of Open Payments

- Review updates in legislation to bill AB-1278, requiring physicians to disclose transfers of value from pharmaceutical/medical device prior to writing prescriptions to patients
- Hear insights and reasoning behind the proposal, along with opinions of support and opposition
- Consider the impact on the future of transparency

Thomas Sullivan, Editor, **Policy & Medicine**

9:35-10:20 AM

### Mitigate Risk through Use of Transparency Data

- Identify key risk indicators through interpretation of aggregate spend data
- Determine risk tolerance and make adjustments based on lessons learned from spend transparency
- Consider approaches for eliminating risk moving forward through careful analysis of the data

Frank Spender, Senior Director, Compliance Services, **IQVIA**

Johan Holm, Director, Compliance Services, **IQVIA**

10:20-10:50 AM

### NETWORKING AND REFRESHMENT BREAK

10:50-11:35 AM

### Assess the Evolving Drug Pricing Transparency Environment

- Consider the dynamic drug pricing environment's impact on the industry
- Review state by state drug pricing reporting law requirements
- Address best practices for monitoring and keeping a pulse on the evolving landscape

Moderator: Brian Bohnenkamp, Partner, FDA & Life Sciences, **King & Spalding LLP**

Panelists:

Donna White, Vice President, Compliance, **Chiesi**

Grant Ostlund, Senior Manager, Government Accountability – Ethics, Compliance and Privacy, **Novo Nordisk**

Tiffany Nowell, Assistant General Counsel, Global Pricing and Health and Value, **Pfizer**

|                         |  |
|-------------------------|--|
| <p>11:35AM-12:20 PM</p> | <p><b>Deep-Dive on Data Analytics: Pre-Pandemic Vs. Post-Pandemic</b></p> <ul style="list-style-type: none"> <li>• Ensure accuracy in data analysis to further drive business decisions</li> <li>• Learn to use spend data to your company's advantage</li> <li>• Determine how to get ahead and correct any errors</li> <li>• Leverage data insights to avoid any speculation of fraud or misinformation</li> </ul> <p><i>Michael O'Connor, Vice President, Compliance Technology, <b>Porzio Life Sciences, LLC</b></i><br/> <i>Audrey DeGuarde, Associate Vice President, Global Transparency, <b>Porzio Life Sciences, LLC</b></i></p>  |
| <p>12:20-1:20 PM</p>    | <p><b>NETWORKING LUNCHEON</b></p>  |
| <p>1:20-2:05 PM</p>     | <p><b>Manage International Transparency Reporting Beyond Data</b></p> <ul style="list-style-type: none"> <li>• Set up for success with an international transparency readiness assessment</li> <li>• Discuss the benefits of compliance awareness risk evaluation</li> <li>• Assess best practices to adapting to the fast-changing reporting requirements</li> </ul> <p><i>Jenny Pu, Associate Director, <b>Guidehouse Life Sciences</b></i><br/> <i>Giulia Bolzonello, Manager, Global Spend Transparency, <b>Vertex Pharmaceuticals</b></i></p>   |
| <p>2:05-2:50 PM</p>     | <p><b>Review Lessons Learned of Reporting Mishaps and Mistakes to Set up for Success</b></p> <ul style="list-style-type: none"> <li>• Uncover tips and tricks for implementing effective transparency processes</li> <li>• Benefit from case studies of missteps that have plagued industry peers</li> <li>• Enhance compliance operations through reflection of industry horror stories</li> </ul> <p><i>Panelists:</i><br/> <i>Kshitij Aggarwal, Manager, Compliance Operations and Transparency Reporting, <b>Alexion Pharmaceuticals</b></i><br/> <i>Kelly Tope, Ethics &amp; Compliance Lead, Monitoring, Transparency and Samples, <b>Takeda</b></i><br/> <i>Patrick Wallace, Associate Director, Compliance, Global Transparency, <b>argenx</b></i><br/> <i>Mark Scallon, Partner, <b>Baker Tilly</b></i></p> |
| <p>2:50-3:05 PM</p>     | <p><b>Open Forum for Benchmarking, Q&amp;A and Best Practice Sharing</b></p> <p>Join peers for an open dialogue of questions, comments and suggestions for effectively preparing for the next cycle of reporting. Bring your own challenge, clarify outstanding questions and connect with like-minded industry colleagues to ensure excellence in your reporting processes.</p> <p><i>Facilitator:</i><br/> <i>Brian Sharkey, Director, Compliance, U.S. Commercial, <b>Teva Pharmaceuticals</b></i></p>  |
| <p>3:05 PM</p>          | <p><b>CLOSE OF IN-PERSON CONFERENCE</b></p>  |



## DAY THREE (VIRTUAL): THURSDAY, DECEMBER 9, 2021

10:00-10:15 AM

### Co-Chairs' Welcoming Remarks

*John Oroho, Executive Vice President and Chief Strategy Officer, Porzio Life Sciences LLC*  
*Neal Rafferty, Senior Director, Compliance Officer – North America, Merz Aesthetics*

10:15-11:00 AM

### CMS TOWN HALL: First-Hand Guidance for Effective Reporting Preparations

Benefit from a deep-dive presentation followed by Q&A with the CMS Open Payments Team. Topics of discussion include:

- Review and analysis of published 2020 Open Payments data
- Recommendations for preparing for 2021 reporting submissions
- Guidance for expanded nature of payment categories

*Veronika Peleshchuk Fradlin, Acting Director, Division of Data and Informatics, Centers for Medicare and Medicaid Services (CMS)*  
*Kathleen Ott, Management Analyst, Centers for Medicare and Medicaid Services (CMS)*  
*Chris Kalck, Open Payments Help Desk Lead, Centers for Medicare and Medicaid Services (CMS)*  
*Amy Hammonds, Open Payments Program – Communications, Centers for Medicare and Medicaid Services (CMS)*

11:00-11:45 AM

### Analyze Assumptions Document Decision Making

- Hear best practices for providing a comprehensive document with clear information explaining calculated transfers of value
- Consider what points should be included and best methodologies for conveying accurate insights

*Yvonne Clark, Senior Corporate Compliance Counsel, Spark Therapeutics*  
*Dhara Moro, Associate Director, Compliance Operations, Sage Therapeutics*

11:45 AM-12:45 PM

### TAKE TIME FOR VIRTUAL NETWORKING WITH COLLEAGUES AND VISITING THE EXHIBIT HALL

#### Porzio Solution Summit: A True Global Transparency Solution with Porzio GST

Porzio Life Sciences® understands the job of compliance professionals because we are compliance professionals. PLS is the only solutions provider that pairs unparalleled legal and regulatory knowledge with the latest technology to bring you best in class solutions for all of your compliance operation's needs. Our integrated compliance operations platform keeps you on top of the current laws, codes, and regulations while also providing the tools necessary to embed risk management into all relevant processes in your organization. Join PLS experts and experience a hands-on demonstration of how our compliance operations platform can provide you with a seamless experience to manage risk, end to end throughout your organization. All PLS solutions are built from the law by compliance operations experts.

*Audrey DeGuarde, Assistant Vice President, Global Transparency, Porzio Life Sciences, LLC*  
*Michael O'Connor, Vice President, Compliance Technology, Porzio Life Sciences, LLC*

12:45-1:30 PM

### Uncover Unique Approaches to Virtual Monitoring and Investigation Procedures

- Hear innovative practices to compliance monitoring, including social media monitoring and field relations programs
- Enhance knowledge of industry guidelines, regulations and internal processes to monitor proactively
- Identify potential issues in monitoring HCP interactions and promotional activities and prepare to respond to identified risks

*Allison Gould, Senior Director, Corporate Compliance, Blue Earth Diagnostics*

1:30-2:30 PM

**In-Depth Breakout Discussions by Company Type and Size**

Take the opportunity to convene with like-minded colleagues and companies to benchmark optimized reporting processes through collaborative conversation, with the understanding that strategies to transparency reporting are not one-size-fits all.

**A. Small/Emerging Bio/Pharma**

*Facilitators:*

*Katherine Verdin, Compliance Operations, TG Therapeutics  
Patrick Wallace, Associate Director, Compliance,  
Global Transparency, argenx*

**B. Mid-Large Size Bio/Pharma**

**C. Medical Device**

*Facilitators: Mareike Breitling, Head of Compliance  
Operations, Director, Data Privacy & Compliance Officer,  
Carl Zeiss Meditec Inc.*

*Danielle Hutchinson, Director, Global Transparency  
Operations and Governance, BD*

2:30 PM

**CLOSE OF VIRTUAL DAY 1**

 **DAY FOUR (VIRTUAL): FRIDAY, DECEMBER 10, 2021**

**CURATED IN-PERSON SESSIONS FOR VIRTUAL STREAMING**

9:00-10:00 AM

**PwC Solution Summit: Digitize your End-to-End HCP and HCO Management Lifecycle**

Join to learn how PwC's products and solutions bring HCP / HCO interactions, reporting and analytics, and compliance into one place, from strategic planning to contracting, through payment processing, transparency reporting and monitoring.

*Tim Canonico - Partner, Health Industries Advisory Products Leader, PwC  
Baris Goc - Director, HCP Engagement Solutions, PwC  
Christine Hanger - Senior Manager, Risk Consulting, PwC  
Christina Woods - Director, Health Industries Advisory, PwC  
Kim Mirabella - Senior Manager, PwC  
Michael Pignotti - Senior Manager, PwC*

10:00-10:45 AM

**Sunshine Act Enforcement on Watch: DOJ Reflection on Recent Open Payments Settlements**

- Analyze recent Sunshine Act violations and benefit from regulatory insights to avoid facing similar situations
- Hear guidance to compliantly navigate transparency reporting
- Discover key trends and considerations to be aware of from an enforcement perspective
- Keep a pulse on proposed legislations and the potential impact on open payments

*Moderator: Tim Robinson, Chief Legal and Privacy Officer, MediSpend*

*Panelists: Charlene Fullmer, Assistant United States Attorney, Deputy Chief, Affirmation Litigation, U.S. Department of Justice  
David Walk, Assistant United States Attorney, U.S. Department of Justice*

10:45 AM-12:15 PM

**SUNSHINE ACT SHOWCASE**

*Preparing for the Future of Open Payments: Sunshine Act Expansion, New Nature of Payment Categories and Final Rule Considerations*

**I. Optimize Operational Processes to Execute Upon Sunshine Act Expansion**

- Evaluate challenges in tracking activities of covered recipients in 2021
- Assess concerns for 2021 data submissions and strategies to overcome obstacles
- Hear preparations for the upcoming review and dispute period
- Consider outcomes and potential implications of published 2021 data

**II. Prepare for New Nature of Payment Categories**

- Hear steps taken for reporting in the new categories of debt forgiveness, long term medical supply or device loan and acquisitions
- Highlight key considerations for accurately reporting data within the new stand-alone payment buckets

**III. Determine the Impact of Proposed Changes to the Open Payments Rule**

*Moderator:* Brian Bohnenkamp, Partner, FDA and Life Sciences, **King & Spalding LLP**

*Panelists:*

Tammy Brintzingerhoffer, Director, Global Transparency Reporting, **Johnson & Johnson**

Susan Hibbard, Associate Director, Transparency, Office of Ethics and Compliance, **Boehringer Ingelheim**

12:15-1:30 PM

**TAKE TIME FOR VIRTUAL NETWORKING WITH COLLEAGUES AND VISITING THE EXHIBIT HALL**

1:30-2:15 PM

**Deep-Dive into State Representative Registration Considerations**

- Hear a comprehensive overview of state representative registration requirements
- Discuss the current status of the Oregon Representative Licensure Bill
- Consider operational processes for maintaining compliance with registration requirements

Amie Phillips Pablo, Director, Ethics and Compliance, **Novo Nordisk**

Melissa Blaco, Senior Director, Compliance Reporting, **Regeneron Pharmaceuticals**

**More Industry Praise for  
Transparency &  
Aggregate Spend**



“This was the best run virtual conference I have attended. I was pleased with the CBI/ Informa-Connect facilitators, the amazing presenters and the outstanding caliber of attendees.”



“A very successful event – From a content perspective, this was the best conference I’ve seen!”



“Thanks for the Herculean effort that went into producing the conference. I enjoyed participating, and things ran very smoothly!”

 **DAY FOUR (VIRTUAL): FRIDAY, DECEMBER 10, 2021**

**CURATED IN-PERSON SESSIONS FOR VIRTUAL STREAMING**

|                     |  |
|---------------------|--|
| <p>2:15-3:00 PM</p> | <p><b>Evaluate Proposed Requirement to Inform Patients of Open Payments</b></p> <ul style="list-style-type: none"> <li>• Review updates in legislation to bill AB-1278, requiring physicians to disclose transfers of value from pharmaceutical/medical device prior to writing prescriptions to patients</li> <li>• Hear insights and reasoning behind the proposal, along with opinions of support and opposition</li> <li>• Consider the impact on the future of transparency</li> </ul> <p><i>Thomas Sullivan, Editor, Policy &amp; Medicine</i></p>   |
| <p>3:00-3:45 PM</p> | <p><b>Review Lessons Learned of Reporting Mishaps and Mistakes to Set up for Success</b></p> <ul style="list-style-type: none"> <li>• Uncover tips and tricks for implementing effective transparency processes</li> <li>• Benefit from case studies of missteps that have plagued industry peers</li> <li>• Enhance compliance operations through reflection of industry horror stories</li> </ul> <p><i>Panelists:</i><br/> <i>Kshitij Aggarwal, Manager, Compliance Operations and Transparency Reporting, Alexion Pharmaceuticals</i><br/> <i>Kelly Tope, Ethics &amp; Compliance Lead, Monitoring, Transparency and Samples, Takeda</i><br/> <i>Patrick Wallace, Associate Director, Compliance, Global Transparency, argenx</i><br/> <i>Mark Scallon, Partner, Baker Tilly</i></p> |
| <p>3:45 PM</p>      | <p><b>CLOSE OF CONFERENCE</b></p>  |

**SPONSORSHIP AND ACCREDITATION**

**GOLD SPONSOR:**



Founded in 1962, Porzio, Bromberg & Newman is a full-service law firm with 90 lawyers throughout offices in New York City, Washington, DC, Morristown, Ocean City, and Princeton, NJ, Westborough, MA and San Juan, Puerto Rico (Porzio, Bromberg & Newman (PR, LLC)). Porzio is committed to serving clients and achieving results through legal strategy, advocacy, technology and consulting services offered through the law firm and its three wholly-owned subsidiary companies. The firm provides legal services in the areas of employment, litigation, bankruptcy and refinancing, white collar defense, governmental investigations, environmental, real estate, wealth preservation and tax planning, to companies from Fortune 500 corporations to start-up companies and public organizations and charities.

Porzio Life Sciences, LLC provides comprehensive commercialization and compliance solutions for Life Sciences companies at all stages of growth and development. A pioneer in the industry, Porzio Life Sciences offers services and software products that combine the law, compliance and life sciences business operations. Porzio Life Sciences' modular approach works to minimize risks and maximize efficiency for in-house compliance, legal and regulatory teams related to global, federal and state marketing and sales regulations, transparency reporting, supply chain licensing and third party HCP engagement.

**EDUCATIONAL SPONSOR:**



MedPro Systems® is the Life Sciences industry's most trusted partner to support their business and regulatory challenges. Our industry-leading software and services assists our customers in meeting Aggregate Spend, DSCSA, PDMA, and Stark Law requirements through our premier MedProID® platform and expert MedPro Compliance Advisory Services. For more information, please visit [www.medprosystems.com](http://www.medprosystems.com).

**SUPPORTING SPONSORS:**



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Maximize your access to decision-makers and align your brand with the life sciences industry's premier thought leaders and industry innovators. Informa Connect's custom sponsorship programs are designed to support your organization's overall business development and marketing initiatives through meaningful prospect and customer interactions, brand assertion campaigns and content-rich thought-leadership opportunities. Capitalize on the life sciences community's premier platform for peer-to-peer exchange, solution driven content and first class networking opportunities. For more details contact **John Egan** | [john.egan@informa.com](mailto:john.egan@informa.com) | **908-310-7683**

## CONTINUING EDUCATION CREDITS

### CPE CREDITS

#### LEARNING OBJECTIVE:

To provide compliance and legal professionals key updates and industry regulations that impact transparency and aggregate spend reporting processes.

#### DELIVERY METHOD:

Group Internet-Based

#### NASBA FIELD OF STUDY:

Specialized Knowledge

#### PREREQUISITE REQUIREMENTS:

None

#### PROGRAM LEVEL:

Intermediate

#### ADVANCE PREPARATION:

None

#### CANCELLATION BY YOU:

Except as may be otherwise expressly advised as part of the particular Event's registration process, you may cancel your registration in accordance with this Condition: You will receive a refund of your fees paid to Informa (if any) if you cancel your registration 57 days or more before the Event, subject to an administration charge equivalent to 10% of the total amount of your fees plus Taxes (if applicable). The Company regrets that the full amount of your fee remains payable in the event that your cancellation is 56 days or less before the Event or if you fail to attend the Event. If a cancellation changes the entitlement to a multi-registration discount, the lowest value registration will be canceled first. No cancellations are accepted once any part of a single or multi registration party has accessed the pre-Event networking or partnering facilities, applications or platforms. All cancellations must be sent by email to [connect.cancellations@informa.com](mailto:connect.cancellations@informa.com) marked for the attention of Customer Services and must be received by Informa. You acknowledge that the refund of your fees in accordance with Condition 3 is your sole remedy in respect of any cancellation of your registration by you and all other liability is expressly excluded.

#### PLEASE NOTE:

Speakers and agenda are subject to change. In the event of a speaker cancellation, every effort to find a suitable replacement will be made. The opinions of the conference faculty do not necessarily reflect those of the companies they represent or Informa Connect.

AICPA/NASBA guidelines for Continuing Professional Education (CPE) credits are based on a 50-minute credit hour in qualifying NASBA CPE subject areas. One credit equals 50 minutes, and are rounded down to the nearest half-credit. Networking breaks are omitted from the total CPE minutes. This event qualifies for up to 19.5 CPE credits.

*\*Events beyond our control include: severe weather conditions, natural and man-made disasters and any other similar events.*

#### COMPLAINT RESOLUTION POLICY:

For more information regarding refund, complaint and/or program cancellation policies please contact Juliet Nelson at (339) 298-2140 or email at [juliet.nelson@informa.com](mailto:juliet.nelson@informa.com)

#### OFFICIAL NASBA SPONSOR STATEMENT:

Informa Connect-CBI is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org)

*\*\*Disclaimer: Agenda is subject to change. Credits are awarded based on participation and are pending approval. Credits are based on session monitoring.*

### CLE CREDITS

CLEs are based on a 60-minute hour. Informa Connect is an accredited distance learning provider with PACLE (Pennsylvania CLE Board). Excluding PA, we can issue a certificate that may be used to file with the appropriate MCLE Board(s) or Commission(s). Introductory remarks, unrelated keynotes, business meetings, breaks, receptions, and so on, are not included in the computation of credit. Credit numbers are calculated based on individual participation.



# Informa AllSecure

This event is produced to the Informa AllSecure Standard

## Ten Priority Commitments at all Informa Events



Post COVID-19, all Informa events will be run in accordance with the AllSecure standard, applying the full range of recommendations wherever applicable and possible, but with a commitment to ten key priorities:

### Cleaning and Hygiene

**1**  **ENHANCED CLEANING:** All events will undertake enhanced, deep cleaning before, during and after our events, working with venue partners to ensure the highest standards of hygiene and cleanliness. This includes continuous sanitisation throughout the course of an event, with a focus on high-touch areas such as door handles, restrooms and food and beverage areas.

**2**  **PERSONAL HYGIENE:** All events will provide additional hand washing facilities and hand sanitising stations throughout the event space, encouraging all participants to regularly wash and disinfect their hands.

### Physical Distancing

**3**  **NON-CONTACT REGISTRATION:** All events will employ a system that facilitates non-contact registration for participants, including the availability of online registration.

**4**  **PHYSICAL CONTACT:** All events will request that participants avoid physical contact, such as hand shakes and embraces, promoting alternative ways to greet business partners. The exchange of printed materials, such as business cards and sales brochures, will also be discouraged, with digital alternatives recommended.

**5**  **PHYSICAL DISTANCING:** All events will maintain a density of participants in line with local authority guidance. In the absence of local guidance, a minimum of 1-1.5 meters (or 3-4.5 feet) is recommended. This will be managed through one or more control measures such as pre-show communications to participants, a one-way traffic system around show floors, staggered entry times, on-site signage and floor markings and on-site social distance ambassadors.

**6**  **FOOD AND BEVERAGE STATIONS:** All event teams will work closely with venue partners to employ the highest standard of food safety, minimising self-service buffets in favour of pre-packaged food options. If any queuing is anticipated, social distancing will be maintained through the use of floor markings and relevant signage.

### Detect and Protect

**7**  **PERSONAL PROTECTIVE EQUIPMENT (PPE):** Participants at all events will be asked to wear a face mask on entry. Further items of PPE, such as gloves and eye screens, will be used by participants and staff if appropriate, in line with local government and health authority advice.

**8**  **FIRST AID:** All events will have access to a qualified first aider and a separate quarantine area if possible. Participants will be asked not to attend if they are feeling unwell, and teams will follow local health authority guidance on detecting and managing anyone who displays symptoms of COVID-19.

**9**  **SCREENING:** All events will follow relevant health authority guidance on screening participants. This may include checking the temperatures of everyone on entry, through thermal scanning or other screening processes.

**10**  **TRACE AND CONTACT:** Should it be necessary, we will work with local authorities to trace and contact participants at our events, subject to local privacy regulations.

| REGISTRATION FEE                             |  | STANDARD RATE |
|--|--|---------------|
| Life Sciences<br>Manufacturers               | All Access Pass<br>(In-Person + Virtual) | \$2399        |
|  | Virtual-Only                             | \$1799        |
| Solution Providers/<br>Consultants/Law Firms | All Access Pass<br>(In-Person + Virtual) | \$4399        |
|  | Virtual-Only                             | \$2299        |



**EARN CLE AND  
CPE CREDITS\***

PENDING FINAL  
APPROVAL

**VENUE  
INFORMATION:**

**HILTON PHILADELPHIA AT PENN'S LANDING**  
**201 SOUTH COLUMBUS BLVD | PHILADELPHIA, PA 19106**  
 HOTEL DIRECT LINE: +1 215 521 6500

**ACCOMMODATIONS:** For hotel room availability and direct booking links, please visit the conference website and select the Plan Your Visit tab. Rooms are limited and the discounted rate will expire in advance of the meeting, so please book early. All travel arrangements are subject to availability. **PLEASE NOTE:** All hotel reservations for this conference should be booked directly with the hotel using the above link only. Informa Connect does not partner with housing bureaus or third party agencies for this event and none are authorized to call or contact you on our behalf.

**4 WAYS TO REGISTER NOW!**



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 339-298-2140



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**EMAIL**  
[juliet.nelson@informa.com](mailto:juliet.nelson@informa.com)

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& AGG SPEND TEAM:**



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