Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
SECRETARY OF THE SENATE
17 MAY 23 PM 5:00

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): American Telemedicine Association

Travel date(s): April 24-25, 2017

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☒ Actual Amount	$324.34	$154.66	$150	$500 - Registration Fee

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Please see attached.

5/17/17 (Date) — Aimee M. GRACE (Printed name of traveler) — Aimee M. Grace (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

☒ I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

5/23/17. (Date) — Brian Schatz (Signature of Supervising Senator/Officer)

(Revised 1/3/11) **Form RE-2**

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American Telemedicine Association 2017 Conference, Aimee Grace (Schatz)

During the ATA conference, I attended a session on Planning for MACRA; I spoke at a Congressional lunch roundtable; I participated in a Pacific Island ATA chapter annual meeting, and I attended the pediatric speed rounds event. I also attended receptions hosted by various health IT companies as part of the conference activities. I also met with stakeholders for Senator Schatz's CONNECT for Health Act and discussed revisions to the bill with stakeholders and other congressional staff.

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Date/Time Stamp:

17 MAR 23 PM 3:06

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Aimee M. GRACE

Employing Office/Committee: Office of U.S. Senator Brian Schatz

Private Sponsor(s) (list all): American Telemedicine Association

Travel date(s): April ~~23~~ 24-25, 2017

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Orlando, FL

Explain how this trip is specifically connected to the traveler's official or representational duties:

I am Senator Schatz's health policy advisor and he is the lead sponsor of the CONNECT for Health Act (S. 2484). He also was the lead cosponsor on the ECHO Act, which passed into law last year. The American Telemedicine Association conference offers significant opportunities for learning more about telehealth as well as networking with other staffer and stakeholders on this topic.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

3-23-17
(Date)

Aimee M. Grace
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Sen. Brian Schatz *(Print Senator's/Officer's Name)* hereby authorize Aimee M. GRACE *(Print Traveler's Name)*

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. *(signify "yes" by checking box)* ☐

3-23-17.
(Date)

Brian Schatz
(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

Form RE-1

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AMERICAN TELEMEDICINE ASSOCIATION

American Telemedicine Association
1100 Connecticut Ave. NW, Suite 540, Washington, DC 20036-4146
Phone: 202.223.3333 Fax: 202.223.2787 www.americantelemed.org

March 8, 2017

Dr. Aimee Grace
Office of Sen. Schatz
SH-722 Hart Senate Office Building
Washington, D.C. 20510

Dear Dr. Grace:

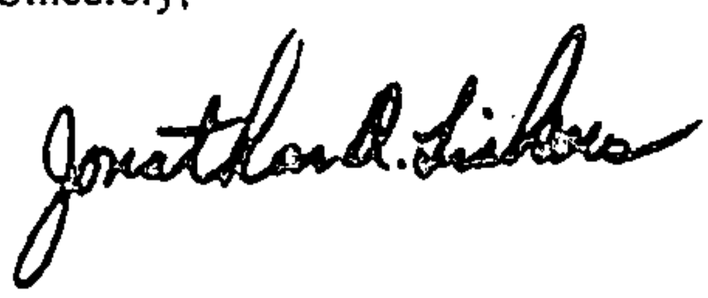
We invite you to attend the ATA Annual Conference and Trade Show in Orlando, FL from April 23-25. The ATA Conference is the world's largest and most comprehensive meeting focused on telemedicine, digital, connected and mobile health.

During the visit, you will have the opportunity to tour our exhibit hall featuring over 300 healthcare technology products, and hear about 100 peer-reviewed sessions – as well as keynote presentations from leading individuals transforming the telehealth industry – on how they're overcoming barriers and advancing telemedicine through the professional, ethical and equitable improvement in health care delivery.

Knowing of your role in advising Sen. Schatz on health issues, we believe this visit might provide needed insights into the impacts of certain federal policies on telehealth-provided services and payment innovations in your state.

Thank you in advance for your consideration. I hope that you will be able to accept our invitation to participate. I will follow-up with your office regarding the details of this event.

Sincerely,



Jonathan D. Linkous
Chief Executive Officer

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

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1. Sponsor(s) of the trip (please list all sponsors): American Telemedicine Association

2. Description of the trip: annual association meeting with about 5,000 attendees

3. Dates of travel: Monday April 24 - Tuesday April 25

4. Place of travel: Orlando, FL

5. Name and title of Senate invitees: Aimee Grace, Health Policy Advisor for Sen. Schatz

6. I *certify* that the trip fits one of the following categories:

   ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

   – OR –

   ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) *(see question 9)*.

7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

   – AND –

   ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

8. I *certify* that:

   ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.

   – AND –

   ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

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9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**
I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10).*

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

attached

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

attached

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

attached

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Association is a 501(c)(3) membership organization. This meeting will have more than 100 educational sessions (meeting the criteria for continuing medical education credit).

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate ☐ Actual Amounts	attached	attached	attached	attached

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

Association annual meeting is arranged and organized without regard to Congressional participation

18. Reason for selecting the location of the event or trip

Meeting location varies for membership convenience

19. Name and location of hotel or other lodging facility:

Hyatt Regency Orlando

20. Reason(s) for selecting hotel or other lodging facility:

primary hotel for 2017 meeting

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21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging will be covered by hotel space available to sponsor for meeting package. Lunches will be part of public meeting services and sessions.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Coach class commercial air

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

No additional entertainment over and above what is listed in the daily schedule (attachment per #11)

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: [signature]

Name and Title: Jonathan D. Linkous, Chief Executive Officer

Name of Organization: American Telemedicine Association

Address: 1100 Connecticut Ave NW, Washington, DC 20036

Telephone Number: 202-223-3333

Fax Number: 202-223-2787

E-mail Address: jlinkous@americantelemed.org

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Attachment to Private Sponsor Travel Certification Form for the American Telemedicine Association

5. Mary Margret Johnson with Sen. Wicker
Aimee Grace with Sen. Schatz

11. A detailed itinerary is as follows:

Monday, April 24

8:30 am -9:30 am	Plenary: Meeting The Challenges
9:30 am – 10:15 am	Coffee Break in Exhibit Hall
10:15 am – 11:15 am	Concurrent Session: Telemental Health, from Integration to Transformation
11:30 am – 12:30 pm	Concurrent Session: Planning for MACRA, Health Reform Regulatory and Reimbursement Changes
12:30 pm – 1:30 pm	Federal Policy Luncheon **(Johnson and Grace will speak)**
1:30 pm – 2:30 pm	Concurrent Session: Tele-Emergency Performance Assessment Reporting Tool: A Standardized Approach to Measuring Impact
2:45 pm – 3:45 pm	Concurrent Session: Transforming Care for Sexual Assault Patients, Clinicians and Communities
3:45 pm – 4:30 pm	Coffee Break in Exhibit Hall
4:30 pm – 5:30 pm	Spotlight Session: Women in Telemedicine: Leading The Charge of Healthcare Innovation
5:30 pm - 6:30 pm	Reception in Exhibit Hall

Tuesday, April 25

8:30 am - 10:00 am	Plenary: Expectations for Telemedicine and ATA
10:00 am – 10:45 am	Coffee Break in Exhibit Hall
10:45 am – 11:45 am	Concurrent Session: Children's Health to Family Health: Leveraging Technology to Increase Access to Care
11:45 am – 12:45 pm	Lunch in Exhibit Hall
12:45 pm – 1:45 pm	Concurrent Session: Telehealth of Tomorrow: Wearables & Apps to Data Analytics to New Payment Models and Beyond
2:00 pm - 3:00 pm	Concurrent Session: From Volume to Value: Changing the Role of Telemedicine

This a multi-purpose, multi-track convention of a 501(c)(3) membership organization with about 5,000 attendees, featuring over 100 educational sessions (meeting the criteria for continuing medical education credit) and a large exhibit of commercial goods and services and other stakeholders (including some federal agency exhibits). The attendees will choose their specific activities.

More detailed convention information is at http://www.ata2017.org.

12. American Telemedicine Association is the leading resource and advocate promoting access to medical care for consumers and health professionals via telecommunications technology. ATA

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seeks to bring together diverse groups from traditional medicine, academic medical centers, technology and telecommunications companies, e-health, medical societies, government and others to overcome barriers to the advancement of telemedicine through the professional, ethical and equitable improvement in health care delivery.

Established in 1993 as a non-profit organization and headquartered in Washington, DC, membership in the Association is open to individuals, healthcare institutions, companies and other organizations with an interest in promoting the deployment of telemedicine throughout the world. ATA is governed by a Board of Directors which is elected by the association's membership.

13. The world's largest and most comprehensive meeting focused on telemedicine, digital, connected and mobile health will take place April 23-25, 2017, at the Orlando Convention Center. For over 20 years, the American Telemedicine Association's (ATA) Annual Conference & Trade Show has been the premier forum for healthcare professionals and entrepreneurs in the telemedicine, telehealth and mHealth space. An estimated 5,000 attendees from traditional medicine, academic medical centers, technology and telecommunications companies, e-health, medical societies, government and others will attend.

16. Total Expenses –

Transportation - $400 – ($350 round trip airfare; $50 for transportation to and from the airport and hotel.)
Lodging – 2 nights for $590
Food – 3 days for $510 (This includes breakfast, coffee breaks, lunch, reception and dinner)
Other: Registration $775 government rate

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Grace, Aimee (Schatz)

Subject: FW: You interested in attending Amer Telemedicine Assn convention in Orlando April 23-25?
Attachments: Grace package 4 ATA.pdf

From: Gary Capistrant [mailto:gcapistrant@americantelemed.org]
Sent: Wednesday, March 8, 2017 1:44 PM
To: Grace, Aimee (Schatz) <Aimee_Grace@schatz.senate.gov>
Cc: Courtney Mesmer <cmesmer@americantelemed.org>
Subject: RE: You interested in attending Amer Telemedicine Assn convention in Orlando April 23-25?

Aimee, attached is a letter invite and Ethics paperwork for attending our Convention

Other Congressional colleagues interested in attending are-
Mary Margaret Johnson with Sen. Wicker
Nick Uehlecke with Ways and Means Health
Jordan See with Rep. Buddy Carter

For assistance with your hotel arrangement, please contact Courtney (Cced)

Hope it works for you.
Gary

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