

**EDUCATION/CERTIFICATIONS**

University of Florida, Gainesville, FL  
Certificate in Life Care Planning

West Virginia University, Morgantown, WV  
Master of Science in Rehabilitation Counseling with  
specialization in Vocational Evaluation  
Bachelor of Science in Recreation and Parks Management  
with specialization in Therapeutic Recreation

Certified Rehabilitation Counselor  
00007772, 1990-Present

Certified Vocational Evaluator  
00007772, 1991-Present

Certified Life Care Planner  
1013, 2009-Present



**PROFESSIONAL EXPERIENCE**

MACKENZIE LIFE CARE PLANNING, Tyler, TX  
Life Care Planner / Vocational Consultant (July 12, 2021 – present)

- Provide vocational expert analysis/reports/testimony
- Provide life care planning services/testimony.

RESEARCH AND PLANNING CONSULTANTS, Dallas, TX  
Senior Consulting Associate (June 2005- June 30, 2021)

- Provide vocational expert analysis/reports/testimony
- Provide life care planning services/testimony.

PATE REHABILITATION, Dallas, TX  
Case Manager (June 1, 2009- June 30, 2010)

- Coordination and case management for brain-injured adults in post-acute inpatient and outpatient treatment programs.
- Secured precertification from various insurance companies, Workers' Compensation, trust funds, Texas Department of Assistive and Rehabilitative Services and Division of Blind Services, and private pay sources.
- Coordinated all services during treatment and made appropriate community referrals. Maintained contact with payor sources, families, physicians, and therapists, providing adjustment counseling and family training.

**GENTIVA REHAB WITHOUT WALLS, Irving, TX**

Clinical Coordinator (July 2007- July 2009)

- Case management duties for in-home multidisciplinary neurorehabilitation for patients with traumatic brain injuries, spinal cord injuries, and other neurological disorders.
- Coordinated team of therapists, physicians and outside case managers, and referral sources and requested continuing pre-authorization of services.
- Assisted with community referrals to the Texas Department of Assistive and Rehabilitative Services and Texas Workforce Commission, as well as outpatient therapies and Social Security as needed.
- Vocational counseling for return to work.

**NEW BEGINNINGS VOCATIONAL REHAB SERVICES, INC., Allen, TX**

Self-Employed Vocational Consultant (June 2002 – June 2010)

- Contract medical and vocational case management services for Workers' Compensation, Longshore, Long-Term Disability and Disability Insurance clients.
- Provided transferable skills analysis, job-seeking skills training, resume writing, job accommodations, and counseling services.
- Assisted with community referrals to the Texas Department of Assistive and Rehabilitative Services and Texas Workforce Commission, as well as outpatient physical therapy, pain management, functional capacities evaluations, and work hardening as needed.
- Provided comprehensive vocational evaluations and vocational assessments.
- Contract vocational rehabilitation counselor for Union Pacific Railroad.

**SANTE REHABILITATION, Irving, TX**

Case Manager/IR Program Coordinator (March 2005 – February 2006)

- Responsible for case management process of work hardening, work conditioning, and pain management clients. Coordinate Industrial Rehabilitation program between five CARF- and JCAHO-accredited sites. Provided vocational counseling and guidance with emphasis on return to work.

**MEDINSIGHTS, Houston, TX**

Vocational Consultant (January 2002 - August 2005)

- Responsible for vocational case management of Workers' Compensation clients.
- Provided transferable skills analysis, job-seeking skills training, resume writing, vocational evaluation, and counseling.
- Assisted with community referrals to the Texas Department of Assistive and Rehabilitative Services and Texas Workforce Commission, outpatient physical therapy, functional capacities evaluations, and work hardening as needed.

RESOURCE OPPORTUNITIES, INC., Dallas, TX

District Manager (April 2000 - December 2001)

- Responsible for North Texas territory and supervision of seven staff employees.
- Marketing in North/East Texas.
- Completed hiring, training, termination, and performance reviews.
- Tracked monthly revenue and billing.
- Responsible for accounts receivable and collections.
- Provided vocational case management.

Vocational Case Manager

- Developed caseload for vocational case management in North/East Texas territory.
- Provided initial assessments, vocational evaluations/testing, resume development, job placement, and community referrals to the Texas Department of Assistive and Rehabilitative Services and Texas Workforce Commission.
- Marketing of vocational services, including vocational seminars for adjusters with adjuster license credit.

PATE REHABILITATION, Dallas, TX

Case Manager (May 1999 - April 2000)

- Coordination and case management for brain-injured adults in post-acute inpatient and outpatient treatment programs.
- Secured precertification from various insurance companies, Workers' Compensation, trust funds, Texas Department of Assistive and Rehabilitative Services and Division of Blind Services, and private pay sources.
- Coordinated all services during treatment and made appropriate community referrals. Maintained contact with payor sources, families, physicians, and therapists, providing adjustment counseling and family training.

SELF-EMPLOYED, Dallas, TX

Vocational Consultant (March 1999 - May 1999)

- Contracted as a vocational consultant providing assessments for individual clients for Dr. Jack G. Dial, the licensed psychologist. Testing included the McCarron-Dial System, aptitude, academic achievement, physical capacity, and interest inventories.

BLUE RIDGE REHABILITATION SERVICES, Martinsburg, WV

Vocational Case Manager/Vocational Evaluator (August 1998 - February 1999)

- Contracted as Day Program Coordinator for Learning Services Corp. Responsible for designing and implementing a day program curriculum for the adult population with brain injuries. This program encompassed daily living skills, cognitive stimulation, social skills training, awareness of disability, time/money/home management, recreation/leisure skills, community reentry, and vocational assessment and placement. The day program included residential and outpatient clients from the surrounding community.

- Responsible for marketing of company for expansion in Richmond, Virginia, and evaluation of Workers' Compensation clients to determine the potential for return to work, vocational training, transferable skills, and lost wages.

VIRGINIA DEPARTMENT FOR THE VISUALLY HANDICAPPED, Richmond, VA  
Rehabilitation Vocational Evaluator, Virginia Rehabilitation Center for the Blind (August 1991-July 1998)

- Managed and coordinated a caseload of blind/visually impaired clients.
- Counseled clients on personal adjustment, reasonable accommodation, job-related issues, and personal concerns.
- Organized and coordinated client staffing with other personnel to report progress and final recommendations.
- Referred clients to community services and programs when necessary.
- Administered individual aptitude, interest, and physical capacity tests to assess clients' vocational potential.
- Completed transferable skills analysis when appropriate.
- Assessed clients' communication skills to accommodate their needs during the evaluation process.
- Provided recommendations regarding vocational potential and potential for college or vocational training.
- Organized, developed, and taught job readiness classes, including job-seeking skills, resume writing, and mock interviews.

### **AFFILIATIONS**

International Association of Rehabilitation Professionals (IARP)

International Association of Life Care Planners (IALCP)

International Association of Rehabilitation Professionals- Texas Chapter

Secretary 2009-2010, 2010-2011

President 2011-2012, 2019-2020

Past President and Board Member 2012-2013, 2020-2021

Vocational Evaluation and Career Assessment Professionals (VECAP)

International Association of Rehabilitation Professionals, IALCP Forensic Board

Member at Large, 2023-2024

### **PUBLICATIONS/PRESENTATIONS**

International Association of Rehabilitation Professionals, Annual Conference Poster Presentation

*Implications of Teleworking for People with Disabilities*, April 2005, Williamsburg, VA

International Association of Rehabilitation Professionals- Texas Chapter

Labor Market Surveys, May 14, 2004, Dallas, Texas

Alternative Rehabilitation Specialization Areas-Vocational Evaluation, June 6, 2006, Dallas, Texas

The Life Care Plan and Its Relationship to Vocational Rehabilitation, February 24, 2012, Dallas, Texas

Strafford Publishing Webinar

Personal Injury Litigation: Proving or Disproving Economic Damages

Navigating Methodologies and Factors Impacting Court Awards and Best Practices for Recruiting Financial Experts, October 20, 2012

International Association of Rehabilitation Professionals, Annual Conference

*How to Case Manage Friends and Family in the Ocean of Ethics*, October 26, 2012, San Juan, Puerto Rico

Paralegal Division of the State Bar of Texas, Division 3, Tarrant County. August 28, 2013

Capital Area Paralegal Association, Austin, Texas. August 30, 2013

Paralegal Division of the State Bar of Texas, Division 15, McAllen. October 17, 2013

*Creating and Critiquing Life Care Plans for Future Medical Expenses*

Midland County Bar Association Paralegal Division, April 4, 2014. *Proving Or Disproving Economic Damages In Personal Injury Litigation: Clinical and Economic Elements of Life Care Plans*

Paralegal Division of the Texas Bar, April 10, 2014. Webinar presentation: *Proving Or Disproving Economic Damages In Personal Injury Litigation: Clinical and Economic Elements of Life Care Plans*

Texas Board of Legal Specialization Paralegal. June 17, 2014. Webinar: *Personal Injury Litigation: Proving or Disproving Economic Damages. Vocational Assessment and Economic Process for Determining Loss of Earning Capacity*

Stratford, September 18, 2014. Webinar: *Medical Records Discovery in the Digital Age: Tips and Pitfalls to Avoid*

International Association of Rehabilitation Professionals of Texas, October 17, 2014. *Proving Or Disproving Economic Damages In Personal Injury Litigation: Clinical and Economic Elements of Life Care Plans*

Oakes, T., Spencer, S., Hilby, D., Turner, K. (2024 January 22). *Overview of Forensic Services in Litigation* [White paper]. International Association of Rehabilitation Professionals Forensic.