



AMERICAN ACADEMY OF
ORTHOPAEDIC SURGEONS

AMERICAN ASSOCIATION OF
ORTHOPAEDIC SURGEONS

2021 Combined National Orthopaedic Leadership Conference (NOLC) / Fall Meeting

September 26, 2021 – September 29, 2021

JW Marriott – Washington, DC

AGENDA

2021 Combined NOLC / Fall Meeting
Sunday, September 26, 2021 – Wednesday, September 29, 2021
JW Marriott – Washington, DC

AGENDA

Sunday, September 26, 2021

Time	Event	Location	Page
3:00 pm – 7:00 pm	Registration	Grand Foyer A	
4:30 pm – 5:30 pm	Orthopaedic PAC Executive Committee Meeting	Rayburn	
7:00 pm – 9:00 pm	Reception / Dinner – JW Marriott	Capitol Ballroom	

Monday, September 27, 2021

Time	Event	Location	Page
6:30 am – 8:00 am	Breakfast	Grand Foyer	
6:30 am – 5:00 pm	Registration	Grand Foyer A	
6:30 am – 7:30 am	BOS Nominating Committee Meeting	Longworth	
7:30 am – 8:30 am	BOC/BOS Professionalism Committee	Commerce	
8:00 am – 8:30 am	BOS Executive Committee Meeting	Dirksen	
8:30 am – 9:30 am	BOC State Orthopaedic Societies Meeting	Rayburn	
9:30 am – 10:30 am	BOC Research and Quality Committee Meeting	State	
10:30 am – 1:00 pm	General Session	Salons III & IV	
10:30 am – 11:00 am	Welcome and Presidential Line Update	Salons III & IV	
	Moderators: Daniel K. Guy, MD, FAAOS Felix H. Savoie, III, MD, FAAOS Kevin J. Bozic, MD, MBA, FAAOS		
11:00 am – 11:15 am	Award Presentations <ul style="list-style-type: none"> ▪ PAC Participation Awards ▪ State Awards 	Salons III & IV	

11:15 am – 1:15 pm	General Session	Salons III & IV	76
	Symposium I: Prior Authorization		
	Moderators: Wayne A. Johnson MD, FAAOS Claudette M. Lajam, MD, FAAOS		
	Facilitators: Douglas W. Lundy, MD, MBA, FAAOS Robert H. Quinn, MD, FAAOS		
	Presenters: Adam Bruggeman, MD, FAAOS Mikael Moore Mike Proffitt David D. Teuscher, MD, FAAOS Adrian Thomas, MD, FAAOS		
	Overview: Prior authorization continues to get more pervasive with the private insurers. Engage in discussion to learn how meaningful improvements through advocacy and regulatory relief can be utilized.		
1:15 pm – 2:00 pm	Networking Lunch	Salon II	
2:00 pm – 3:30 pm	General Session	Salons III & IV	79
	Symposium II: Physician Wellness		
	Moderators: Alexandra E. Page, MD, FAAOS Alfonso Mejia, MD, FAAOS		
	Facilitator: Elizabeth G. Matzkin, MD, FAAOS		
	Presenters: James R. Ficke, MD, FAAOS Jeffrey Smith, MD, FAAOS, FACS, CPC Jennifer M. Weiss, MD, FAAOS		
	Overview: Physician burnout is on the rise, and physician wellness is increasingly thrust on the orthopaedic surgeon. Best practices to build a foundation of support in the work place will be presented.		
3:30 pm	General Session Adjourns for the Day		
3:30 pm – 3:45 pm	Break	Grand Foyer	
3:45 pm – 5:15 pm	Joint BOC/BOS Open Hearing	Salons III & IV	7
	Moderators: Wayne A. Johnson, MD, MPH, FAAOS Kevin D. Plancher, MD, MPH, FAAOS		
5:15 pm – 5:45 pm	Hill Visit Training	Salons III & IV	
5:45 pm – 6:00 pm	BOC/BOS Resolutions Committee Meeting	Dirksen	

5:45 pm – 6:45 pm	BOC Committee on Economic Issues Meeting	Rayburn
6:00 pm – 7:00 pm	Joint Fundraiser (tentative)	
6:00 pm – 7:30 pm	BOC/BOS Bylaws Review Committee Meeting	Longworth
7:00 pm – 9:00 pm	Reception / Dinner at JW Marriott	Capitol Ballroom

Tuesday, September 28, 2021

Time	Event	Location	Page
6:30 am – 5:00 pm	Registration	Grand Foyer A	
6:55 am – 7:35 am	BOS Business Meeting	Salons III & IV	
	Moderator: Kevin D. Plancher, MD, MPH, FAAOS		
8:00 am – 9:00 am	Breakfast – Keynote Speaker – Leadership Session	Salons III & IV	
	Presenters: Rep. Kim Schrier, MD (D) Rep. Larry Bucshon, MD (R)		
9:00 am – 11:30 am	Virtual Capitol Hill Visits		
11:30 am – 12:30 pm	BOC Executive Committee Meeting	Commerce	
11:30 am – 12:30 pm	Lunch	Salon II	
12:30 pm – 3:00 pm	Virtual Capitol Hill Visits		
3:00 pm – 3:30 pm	Capitol Hill Debriefing	Salons III & IV	
3:30 pm – 4:30 pm	BOC Business Meeting	Salons III & IV	
	Moderator: Wayne A. Johnson, MD, FAAOS		
4:30 pm – 6:00 pm	Joint BOC/BOS Business Meeting: Reports from the Resolutions & Bylaws Review Committee (only BOC/BOS Members can vote)	Salons III & IV	
	Moderators: Wayne A. Johnson, MD, FAAOS Kevin D. Plancher, MD, MPH, FAAOS		
6:00 pm – 6:30 pm	BOC Communications Committee Meeting	Commerce	
7:00 pm – 10:00 pm	Orthopaedic PAC Capitol Club Celebration (tickets required) La Vie – 88 District Square SW, 5 th Floor, Washington, DC	La Vie	

Wednesday, September 29, 2021

Time	Event	Location	Page
6:30 am – 8:00 am	Breakfast	Grand Foyer	
6:30 am – 11:00 am	Registration	Grand Foyer A	
6:45 am – 8:45 am	General Session	Salons III & IV	81
	Symposium III: Big Medicine		
	Moderators: Alexandra E. Page, MD, FAAOS Armando F. Vidal, MD, FAAOS		
	Facilitators: Douglas W. Lundy, MD, MBA, FAAOS Daniel B. Murrey, MD, FAAOS		
	Presenters: Leesa Galatz, MD, FAAOS Rich Gilbert, MD Douglas W. Lundy, MD, MBA, FAAOS Daniel B. Murrey, MD, FAAOS Ronald Navarro, MD, FAAOS		
	Overview: Meeting participants will be educated on Big Medicine and the impact the consolidation in healthcare will have on orthopaedic surgeons.		
8:45 am – 8:55 am	Break	Grand Foyer	
8:55 am – 10:30 am	General Session	Salons III & IV	86
	Symposium IV: The Future of Healthcare: Perspectives from our Thought Leaders		
	Moderators: Kevin D. Plancher, MD, MPH, FAAOS Claudette M. Lajam, MD, FAAOS		
	Facilitator: Douglas W. Lundy, MD, MBA, FAAOS		
8:55 am	Presenter: Congressman Jim Himes, (D)		
9:00 am – 9:25 am	Presenter: Howard Forman, MD, MBA Professor of Radiology & Public Health (Health Policy) Professor in the Practice of Management Professor of Economics (joint by courtesy) Director, YSPH Health Care Management Program Director, MD/MBA Program Faculty Director, Executive MBA Program (Healthcare)		
9:30 am – 9:50 am	Presenter: Senator Chris Murphy (D)		
10:00 am – 10:20 am	Presenter: Senator Bill Cassidy, MD (R)		

Overview: A bipartisan group of Senior Leaders will provide insight into the future of healthcare.

How we are!
Where are we going?
What we need to fix!
What did we learn from COVID-19

10:30 am – 10:45 am	Closing Comments and Adjourn	Salons III & IV
12:00 pm – 4:00 pm	Advocacy Council Meeting	Congressional Room

Informational Items

AAOS Strategic Plan	89
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AAOS Code of Ethics for Governance and Management	110
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Combined NOLC/Fall Meeting Travel Policy	116

TO: Board of Councilors (BOC)
Board of Specialty Societies (BOS)

FROM: Donna J. Malert, CAE
Director, Governance

SUBJECT: Procedures for Use at Joint BOC-BOS Business Meetings

For nearly a decade, the Board of Councilors (BOC) and the Board of Specialty Societies (BOS) have jointly conducted parts of their business meetings. Joint BOC-BOS Committees now consider proposed AAOS advisory opinions, proposed AAOS resolutions, proposed AAOS bylaws amendments, and proposed revisions to the AAOS Standards of Professionalism (SOPs).

Over time, certain procedural rules have developed to govern the process of considering and voting on these matters. They are attached. In summary, when it comes to the joint BOC/BOS Business Meeting, the BOC and the BOS hear the complete discussions on the recommendations of the Joint BOC-BOS Committees, as well as any amendments involving these recommendations. To preserve the autonomy of each group, the BOC and the BOS vote separately on all amendments (if any) and on the final proposal. The final results of the voting – on both amendments and the main motions – are not to be shared until both groups have voted.

The attached document highlights the proposed process that will be used during this meeting.

Thank you for your support, and your efforts on behalf of America's orthopaedic surgeons and their patients.

PROCESS FOR HANDLING PROPOSED AAOS ADVISORY OPINIONS, AAOS RESOLUTIONS, AND AAOS BYLAWS AMENDMENTS [STATEMENTS]

Board of Councilors and Board of Specialty Societies Open Hearing / Business Meeting

JW Marriott
Washington, DC
September 26-29, 2021

Open Hearing (Monday, September 27, 2021 – 3:45 – 5:15 p.m. EDT) (Salons III & IV)

Stephen M. McCollam, MD, FAAOS, the Chair of the BOC/BOS Resolutions Committee, will moderate the discussion relating to the proposed AAOS advisory opinion and AAOS resolutions up for five-year review. Dr. McCollam will provide a brief overview of the one AAOS advisory opinion / and two resolutions up for five-year review. During the discussion, the sponsor of the proposed AAOS advisory opinion may make remarks of no more than five minutes. Following the sponsor remarks, comments from the floor will be accepted, and each speaker (BOC or BOS members only) is allowed no more than two minutes to comment. Up to ten minutes has been allotted for each topic to ensure that there is adequate time to address all of the matters up for consideration. Speakers are asked to be respectful of the time and courteous to others seeking to speak. The schedule follows:

- | | |
|----------------|--|
| 3:45 – 3:55 pm | Proposed AAOS Advisory Opinion #1 – Environmental Sustainability in Orthopaedic Surgery |
| 3:55 – 4:00 pm | Brief Review of Five-Year Review Resolutions <ul style="list-style-type: none">▪ AAOS Resolution #1 – Academy – Public Relations Efforts of the American Academy of Orthopaedic Surgeons▪ AAOS Resolution #2 – Association – Medicare Fees for Orthopaedic Surgeons |

Adolph Yates, Jr., MD, FAAOS, the Chair of the BOC/BOS Bylaws Review Committee, will moderate the discussion of the proposed bylaws amendments. Dr. Yates will provide a brief overview of the proposed AAOS bylaws amendments. During the discussion, the sponsor or appointed representative of the proposed bylaws amendments may make initial remarks of no more than five minutes. Following the sponsor remarks, comments from the floor will be accepted, and each speaker (BOC or BOS members only) is allowed no more than two minutes to comment. As with matters considered by the resolutions process, speakers are asked to be respectful of the time and courteous of others. Up to ten minutes will be allotted for each group of amendments. The schedule follows:

4:00 – 4:10 pm	Proposed AAOS Bylaws Amendment #1 – Association – Professional Compliance Program – Censure/Suspension Related to AAOS Volunteer Opportunities
4:10 – 4:20 pm	Proposed AAOS Bylaws Amendment #2 – Association – AAOS Membership Categories
4:20 – 4:30 pm	Proposed AAOS Bylaws Amendment #3 – Association/Academy – At-Large Positions on AAOS Board of Directors – Three-Year Term Length
4:30 – 4:40 pm	Proposed AAOS Bylaws Amendment #4 – Association/Academy – At-Large Positions on AAOS Board of Directors – Two-Year Term/Two-Year Reappointment Term Length
4:40 – 4:50 pm	Proposed AAOS Bylaws Amendment #5 – Association/Academy – Lay Board Member on AAOS Board of Directors – Addition of Second Lay Member
4:50 – 5:00 pm	Proposed AAOS Bylaws Amendment #6 – Association/Academy – Council Chairs as Non-Voting Ex-Officio Members of the Board of Directors
5:00 – 5:10 pm	Proposed AAOS Bylaws Amendment #7 – Association/Academy – Removal of CEO from the Board as an Ex-Officio Member

Report Drafting (Monday, September 27, 2021)

Anyone with a particularly strong interest in the statements or wishing to be heard beyond the Open Hearing is encouraged to attend the BOC/BOS Resolutions Committee or BOC/BOS Bylaws Review Committee Meetings.

The BOC/BOS Resolutions Committee will meet at 5:45 pm on Monday, September 27, 2021 (Room Dirksen), to develop a report and recommendations on the proposed AAOS advisory opinion and the AAOS resolutions up for five-year review. The end portion of this meeting will be in true executive session, meaning Committee members and AAOS staff only participate.

The BOC/BOS Bylaws Review Committee will meet at 6:00 pm on Monday, September 27, 2021 (Room Longworth), to develop a report and recommendations on the proposed bylaws amendments. The end portion of this meeting will be in true executive session, meaning Committee members and AAOS staff only participate.

AAOS staff will distribute copies of the BOC/BOS Resolutions Committee and BOC/BOS Bylaws Review Committee reports on Tuesday prior to the Joint BOC/BOS Business Meeting. The reports will also be uploaded to the Combined NOLC/Fall Meeting webpage.

Joint BOC and BOS Business Meeting (Tuesday, September 28, 2021, 4:30 – 6:00 pm) (Salons III & IV)

Wayne A. Johnson, MD, FAAOS, BOC Chair, and Kevin D. Plancher, MD, MPH, MS, FAAOS, BOS Chair, will determine who will chair or may determine to jointly chair the Joint BOC/BOS Business Meeting. Donna Malert and Melissa Young will assist the designated Chair in determining parliamentary questions.

Presentation of Reports and Recommendations

The Chairs of the BOC/BOS Resolutions Committee and the BOC/BOS Bylaws Review Committee will present their respective Committee's report and recommendation on each statement and move its adoption. No second is necessary. The discussion should focus on the Committee's recommendation – and speakers should be prompted to indicate whether they support or against are it.

Note that there is 90 minutes allotted for consideration of the items before the BOC and BOS, including separate electronic votes by the BOC and BOS– and that the following guidelines will be followed:

- There will be four microphones -- labeled #1, #2, #3, and #4;
- After the recommendation on each AAOS statement is made by the Chair of the BOC/BOS Resolutions Committee or BOC/BOS Bylaws Review Committee, the primary sponsor of the statement, or appointed representative, (if any) will be asked to concisely provide his or her view on the Committee's recommendation. The sponsor should keep comments brief to permit others to speak and provide sufficient time for voting.;
- Speakers (only BOC or BOS members) should identify themselves, whether they are from the BOC or BOS, and whether they are speaking in favor of or against whatever statement is on the floor; speakers should be concise;
- Speakers should attempt to limit their discussion to items that have not yet been raised;
- Speakers should not speak again until others have had the opportunity to do so; and
- Each topic will be allotted no more than ten minutes, including the request for a separate vote by the BOC and the BOS.

If an amendment is made, the person presenting the amendment should identify whether he or she is from the BOC or BOS. Discussion should then shift entirely to the amendment and whether it should be adopted. Members of the BOC or BOS may speak to the amendment, regardless of which group initially presented the amendment. Voting on amendments will be done separately for the BOC and BOS by electronic polling - Y or N, with results projected immediately after the completion of the voting by both groups.

Once all amendments have been made, each body will vote on the statement as it has been amended by that body. Voting will take place by the electronic audience polling. For all matters coming before the 2021 Combined NOLC/Fall Meeting, voters will select from the following options:

- Accept the Committee's recommendation – as it may be amended
- Do not accept the Committee's recommendation – as it may be amended

The electronic polling results will be projected after voting is completed by both groups.

The schedule for final consideration and vote of the proposed AAOS advisory opinion, five-year review of resolutions and bylaws amendments follows.

4:30 – 4:40 pm	Proposed AAOS Advisory Opinion #1 – Environmental Sustainability in Orthopaedic Surgery
4:40 – 4:50 pm	Five-Year Review Resolutions <ul style="list-style-type: none">▪ AAOS Resolution #1 – Academy – Public Relations Efforts of the American Academy of Orthopaedic Surgeons▪ AAOS Resolution #2 – Association – Medicare Fees for Orthopaedic Surgeons
4:50 – 5:00 pm	Proposed AAOS Bylaws Amendment #1 – Association – Professional Compliance Program – Censure/Suspension Related to AAOS Volunteer Opportunities
5:00 – 5:10 pm	Proposed AAOS Bylaws Amendment #2 – Association – AAOS Membership Categories
5:10 – 5:20 pm	Proposed AAOS Bylaws Amendment #3 – Association/Academy – At-Large Positions on AAOS Board of Directors – Three-Year Term Length
5:20 – 5:30 pm	Proposed AAOS Bylaws Amendment #4 – Association/Academy – At-Large Positions on AAOS Board of Directors – Two-Year Term/Two-Year Reappointment Term Length
5:30 – 5:40 pm	Proposed AAOS Bylaws Amendment #5 – Association/Academy – Lay Board Member on AAOS Board of Director – Addition of Second Lay Member
5:40 – 5:50 pm	Proposed AAOS Bylaws Amendment #6 – Association/Academy – Council Chairs as Non-Voting Ex-Officio Members of the Board of Directors
5:50 – 6:00 pm	Proposed AAOS Bylaws Amendment #7 – Association/Academy – Removal of CEO from the Board as an Ex-Officio Member

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If there are any questions regarding the process, please contact Donna Malert, Director, Governance and Affiliate Relations, at (malert@aaos.org).

2021 Combined NOLC/Fall Meeting
BOC/BOS Open Hearing
Monday, September 27, 2021
3:45 – 5:15 p.m. EDT

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- 3:45 p.m. CALL TO ORDER** (Drs. Johnson and Plancher)
- 3:45 p.m. AAOS ADVISORY OPINIONS** (Dr. McCollam)
1. AAOS Advisory Opinion #1: Environmental Sustainability in Orthopaedic Surgery...
- 3:55 p.m. FIVE-YEAR REVIEW OF AAOS RESOLUTIONS** (Dr. McCollam)
1. Five-Year Review AAOS Resolution #1 – Academy – Public Relations Efforts of the American Academy of Orthopaedic Surgeons.....
 2. Five-Year Review AAOS Resolution #2 – Association – Medicare Fees for Orthopaedic Surgeons
- PROPOSED AAOS BYLAWS AMENDMENTS** (Dr. Yates)
- 4:00 p.m.** 1. Proposed AAOS Bylaws Amendment #1 – Association – Professional Compliance Program – Censure/Suspension Related to AAOS Volunteer Opportunities
- 4:10 p.m.** 2. Proposed AAOS Bylaws Amendment #2 – Association – AAOS Membership Categories.....
- 4:20 p.m.** 3. Proposed AAOS Bylaws Amendment #3 – Association/Academy – At Large Positions on AAOS Board of Directors – Three-Year Term Length
- 4:30 p.m.** 4. Proposed AAOS Bylaws Amendment #4 – Association/Academy – At-Large Positions on AAOS Board of Directors – Two-Year Term/Two-Year Reappointment Term Length.....
- 4:40 p.m.** 5. Proposed AAOS Bylaws Amendment #5 – Association/Academy – Lay Board Member on AAOS Board of Directors – Addition of Second Lay Member.....
- 4:50 p.m.** 6. Proposed AAOS Bylaws Amendment #6 – Association/Academy – Council Chairs as Non-Voting Ex-Officio Members of the Board of Directors
- 5:00 p.m.** 7. Proposed AAOS Bylaws Amendment #7 – Association/Academy – Removal of CEO from the Board as an Ex-Officio Member.....

5:10 p.m. OTHER BUSINESS

5:15 p.m. CLOSING REMARKS (Drs. Johnson and Plancher)

5:20 p.m. ADJOURNMENT

2021 Combined NOLC/Fall Meeting
BOC/BOS Business Meeting
Tuesday, September 28, 2021
4:30 – 6:00 p.m. EDT

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4:30 p.m. **CALL TO ORDER** (Drs. Johnson and Plancher)

4:30 p.m. **AAOS ADVISORY OPINIONS** (Dr. McCollam)

1. AAOS Advisory Opinion #1: Environmental Sustainability in Orthopaedic Surgery...

ACTION: Separate vote by BOC and BOS

4:40 p.m. **FIVE-YEAR REVIEW OF AAOS RESOLUTIONS** (Dr. McCollam)

1. Five-Year Review AAOS Resolution #1 – Academy – Public Relations Efforts of the American Academy of Orthopaedic Surgeons.....
2. Five-Year Review AAOS Resolution #2 – Association – Medicare Fees for Orthopaedic Surgeons

ACTION: Separate vote by BOC and BOS

PROPOSED AAOS BYLAWS AMENDMENTS (Dr. Yates)

4:50 p.m. 1. Proposed AAOS Bylaws Amendment #1 – Association – Professional Compliance Program – Censure/Suspension Related to AAOS Volunteer Opportunities

ACTION: Separate vote by BOC and BOS

5:00 p.m. 2. Proposed AAOS Bylaws Amendment #2 – Association – AAOS Membership Categories

ACTION: Separate vote by BOC and BOS

5:10 p.m. 3. Proposed AAOS Bylaws Amendment #3 – Association/Academy – At Large Positions on AAOS Board of Directors – Three-Year Term Length

ACTION: Separate vote by BOC and BOS

- 5:20 p.m.** 4. Proposed AAOS Bylaws Amendment #4 – Association/Academy – At-Large Positions on AAOS Board of Directors – Two-Year Term/Two-Year Reappointment Term Length.....
ACTION: Separate vote by BOC and BOS
- 5:30 p.m.** 5. Proposed AAOS Bylaws Amendment #5 – Association/Academy – Lay Board Member on AAOS Board of Directors – Addition of Second Lay Member.....
ACTION: Separate vote by BOC and BOS
- 5:40 p.m.** 6. Proposed AAOS Bylaws Amendment #6 – Association/Academy – Council Chairs as Non-Voting Ex-Officio Members of the Board of Directors
ACTION: Separate vote by BOC and BOS
- 5:50 p.m.** 7. Proposed AAOS Bylaws Amendment #7 – Association/Academy – Removal of CEO from the Board as an Ex-Officio Member.....
ACTION: Separate vote by BOC and BOS
- 6:00 p.m.** **CLOSING REMARKS** (Drs. Johnson and Plancher)
- 6:05 p.m.** **ADJOURNMENT**

**2021 Combined NOLC/Fall Meeting
Advisory Opinion #1**

AAOS Advisory Opinion #1: Environmental Sustainability in Orthopaedic Surgery

Sponsor(s): Jason Saleh, MD, FAAOS

Contact: Jason Saleh, MD, FAAOS

Whereas: The healthcare system of the United States plays a major role in our economy comprising almost 18% of the nation's gross domestic product and contributing an estimated 10% of all greenhouse gas (GHG) emissions attributable to our country.

Whereas: Climate change is recognized as a threat to the wellbeing of billions of people around the world and countless ecosystems ⁽ⁱ⁾. Pollution has been implicated in up to 9 million premature deaths around the world annually, and it is increasingly being viewed by experts across the world as a medical emergency. ^(ii, iii) In order to avoid the worst effects of climate change, a rapid reduction in GHG emissions is required. ^{(iv) (v, vi)}.

Whereas: Orthopaedic procedures accounting for roughly 25% of the over 17 million invasive procedures performed annually, and orthopaedic surgeries and procedures are likely a significant contributor to GHG emissions nationally. ^(vii)

Whereas: Much of orthopaedic care delivery requires anesthesia and the delivery of anesthetic gases. The effects of volatile anesthetic agents and their contribution to warming are well documented. ^(viii) Anesthetic gases possess potencies that are orders of magnitude greater than that of carbon dioxide when assessing their potential for atmospheric warming. The anesthesia contribution to GHGs should be considered under the umbrella of orthopaedic care, since examination of other surgical procedures have indicated that anesthetic gas contribute the greatest load of carbon footprint consumption. ^(ix)

Whereas: The exact numbers and statistics of the environmental footprint of orthopaedics are yet undefined, certainties exist on which we can base recommendations. Therefore, be it

Resolved: We as orthopaedic surgeons and AAOS members and Fellows acknowledge:

- 1) Less is less. If we use less equipment, supplies or implants during a procedure, our environmental footprint will decrease. This and all suggestions assume that changes are made which do not affect the patient's clinical outcome or other aspects of their care.
- 2) Less travel equals fewer emissions. The less the patient, doctor and staff have to travel for visits, the fewer GHG will be created.
- 3) Using less water saves water.

- 4) Using fewer inhaled anesthetic agents in orthopaedic cases reduces carbon footprint.

Resolved: That the Board of Directors (BOD) consider the consequences of environmental impact of orthopaedic practice related to procedures, surgeries, to patient visits, to practice habits as a whole. In addressing the impact of orthopaedics, we ask the BOD to take steps to address this as an organization, the AAOS as the Academy and as the Association.

Resolved: In the BOD addressing the environmental impact of orthopaedic surgery, we recommend identifying position statements, task forces, and committees that address further scrutiny of the impact we have and identify future steps to become environmentally sustainable as a profession. Recommendations to shape next steps include, but are not limited to, the following considerations:

- 1) In the absence of evidence-based data to the contrary suggesting superior clinical outcomes, surgeons are encouraged to minimize the use of implants, drapes, trays, instruments, positioners and any other item used in the delivery of orthopaedic care.
- 2) In the absence of evidence-based data to the contrary suggesting superior clinical outcomes, surgeons are encouraged to deliver care while minimizing patient travel including for office visits, physical therapy, lab draws and pre/post-operative evaluations. This includes utilizing video and telephone appointments in lieu of in-person visits when clinically appropriate.
- 3) In the absence of evidence-based data to the contrary suggesting superior clinical outcomes, surgeons should minimize water usage by using waterless scrub when possible and minimizing the number of instruments used in each case.
- 4) In the absence of evidence-based data to the contrary suggesting superior clinical outcomes, surgeons should engage our anesthesia colleagues in discussion regarding minimizing use of inhaled anesthetic agents and performing procedures under regional or local anesthesia when possible.

ⁱ IPCC, 2019: Climate Change and Land: an IPCC special report on climate change, desertification, land degradation, sustainable land management, food security, and greenhouse gas fluxes in terrestrial ecosystems [P.R. Shukla, J. Skea, E. Calvo Buendia, V. Masson-Delmotte, H.-O. Pörtner, D. C. Roberts, P. Zhai, R. Slade, S. Connors, R. van Diemen, M. Ferrat, E. Haughey, S. Luz, S. Neogi, M. Pathak, J. Petzold, J. Portugal Pereira, P. Vyas, E. Huntley, K. Kissick, M. Belkacemi, J. Malley, (eds.)]

ⁱⁱ Landrigan PJ, Fuller R, Acosta NJ, Adeyi O, Arnold R, Baldé AB, Bertollini R, Bose-O'Reilly S, Boufford JJ, Breyse PN, Chiles T. The Lancet Commission on pollution and health. *The lancet*. 2018 Feb 3;391(10119):462-512.

ⁱⁱⁱ Health TL. A tale of two emergencies. *The Lancet*. Planetary health. 2020 Mar;4(3):e86.

^{iv} IPCC, 2018: *Global warming of 1.5°C. An IPCC Special Report on the impacts of global warming of 1.5°C above pre-industrial levels and related global greenhouse gas emission pathways, in the context of strengthening the global response to the threat of climate change, sustainable development, and efforts to eradicate poverty* [V. Masson-Delmotte, P. Zhai, H. O. Pörtner, D. Roberts, J. Skea, P.R. Shukla, A. Pirani, W.

Moufouma-Okia, C. Péan, R. Pidcock, S. Connors, J. B. R. Matthews, Y. Chen, X. Zhou, M. I. Gomis, E. Lonnoy, T. Maycock, M. Tignor, T. Waterfield (eds.)]

^v Martin AB, Hartman M, Lassman D, Catlin A, National Health Expenditure Accounts Team. National Health Care Spending In 2019: Steady Growth For The Fourth Consecutive Year: Study examines national health care spending for 2019. *Health Affairs*. 2021 Jan 1:10-377.

^{vi} Eckelman MJ, Sherman JD. Estimated global disease burden from US health care sector greenhouse gas emissions. *American journal of public health*. 2018 Apr;108(S2):S120-2.

^{vii} <https://www.hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp>

^{viii} Sherman J, Le C, Lamers V, Eckelman M. Life cycle greenhouse gas emissions of anesthetic drugs. *Anesthesia & Analgesia*. 2012 May 1;114(5):1086-90.

^{ix} Thiel CL, Eckelman M, Guido R, Huddleston M, Landis AE, Sherman J, Shrake SO, Copley-Woods N, Bilec MM. Environmental impacts of surgical procedures: life cycle assessment of hysterectomy in the United States. *Environmental science & technology*. 2015 Feb 3;49(3):1779-86.

AAOS ADVISORY OPINIONS
AAOS BOARD ACTIONS and IMPLEMENTATION
Fall 2012 - Present

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
Fall 2012 Philadelphia, PA	BOC/BOS Advisory Opinion #1 (Submitted as Academy Resolution #1)	Provision of Orthopaedic Care in Rural America	Stephen Dow, MD and Nevada Orthopaedic Society	Approved recommendation to refer implementation to the Health Care Systems Committee September 21, 2013.	Board accepted the Health Care Systems Committee report on Rural Access to Orthopaedic Care in March 2014.
Fall 2012 Philadelphia, PA	Academy Resolution #2	Resident Work Hours	Andrew Schmidt, MD and Orthopaedic Trauma Association	Approved recommendation to send letter on behalf of Dr. Jacobs to the ACGME encouraging the ACGME to grant research exemptions from the current residency duty work restrictions and to oppose further resident duty work hour restrictions.	Letter sent to Mr. Timothy Goldfarb of ACGME on December 9, 2013. Add to Unified Advocacy Agenda.
Spring 2013 Washington, DC	BOC/BOS Advisory Opinion #1	AAOS Disability Guidelines for Workers' Compensation Cases	Ian Crabb, MD (NE)	Adopted June 7, 2013. Referred to Project Team.	Project Team recommendations approved by Board at March 10, 2014 Board Meeting. Project Team work concluded.
	BOC/BOS Advisory Opinion #2	Inclusion of Sex and Gender Considerations in AAOS Education, Research and Quality Initiatives	Amy Ladd, MD (Ruth Jackson Orthopaedic Society and AAOS Women's Health Issues Advisory Board)	Adopted June 7, 2013. Referred to the Women's Health Issues Advisory Board.	Addressed through revised Strategic Plan.
	BOC/BOS Advisory Opinion #3	Orthopaedic Surgeon's Loss of Economic Sustainability	John C. Nordt, III, MD (FL)	Received June 7, 2013. No action recommended.	No action.
	BOC/BOS Advisory Opinion #4	Review of Recommendation in Pending AAOS Clinical Guidelines	William Beach, MD (Arthroscopy Association of North America)	Adopted July 7, 2013. Referred to Council on Research and Quality	On-going.
Fall 2013 Austin, TX	BOC/BOS Advisory Opinion #1	Physicians Should Not Bear the Cost of ICD-10 Implementation and Usage	Michael Connair, MD and the Connecticut Orthopaedic Society	Adopted December 7, 2013. Referred to the Council on Advocacy.	Council on Advocacy reported back to the Board. ICD-10 implemented.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
Spring 2014 Washington, DC	BOC/BOS Advisory Opinion #1	Continuing Advocacy for Musculoskeletal Research Funding Mechanisms Related to Military Services	Society of Military Orthopaedic Surgeons (SOMOS)	Adopted June 13, 2014.	On-going activity through Council on Research and Quality and Council on Advocacy.
	BOC/BOS Advisory Opinion #2	Continued Advocacy for Disaster Response Training Programs	Society of Military Orthopaedic Surgeons (SOMOS)	Adopted June 13, 2014.	On-going activity through Council on Education.
	BOC/BOS Advisory Opinion #3	Required Musculoskeletal Education in Medical School: Promoting Diversity and Improving Patient Care	Ruth Jackson Orthopaedic Society (RJOS)	Adopted Part A June 13, 2014. Discussed at Officers' Retreat and letter sent to RJOS. Received Part B and charged the BOS, DAB and RJOS to develop a business plan to implement Part B of the Advisory Opinion.	Workgroup convened (Society Relations, Membership, Marketing and Residents) to explore opportunities for future programming. No business plan will be submitted for FY2015. Idea fits nicely with Education Strategy to embrace students early in their career. Ms. Jones reached out to orthopaedic shared interest groups.
	BOC/BOS Advisory Opinion #4	Public Performance Measures for Orthopaedic Surgeons	American Association of Hip and Knee Surgeons	Adopted Parts A, B and received Part C on June 13, 2014.	On-going activity through Council on Research and Quality. Performance Measures inaugural meeting held July 18, 2014 and Performance Measures Summit held July 19, 2014.
Fall 2014 Nashville, TN	BOC/BOS Advisory Opinion #1	Physician-Owned Distributorships	Christopher Kontogianis, MD (Councilor, Washington State Orthopaedic Society)	Received December 6, 2014.	President directed the Office of General Counsel to provide a synopsis. Article appeared in <i>AAOS Now</i> in March 2015.
	BOC/BOS Advisory Opinion #2	Support for Prototype Orthopaedic Value-Based Registry	Marc DeHart, MD (Councilor, Texas Orthopaedic Association)	Received December 6, 2014.	On-going activity through the Council on Research and Quality. CORQ is already actively investigating the topic.
	BOC/BOS Advisory Opinion #3	AAOS Statement on the Sustainability of Independent Practice	Kevin Schrock, MD and Aaron Guyer, MD (Florida Orthopaedic Society)	Considered by both the BOC and BOS at the 2014 Fall Meeting and was not adopted by either group.	No further action is required.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
Spring 2015 Washington, DC	BOC/BOS Advisory Opinion #1	Request to Change the Maintenance of Certification(MOC) Process of the American Board of Orthopaedic Surgery (ABOS)	Basil R. Besh, MD (California Orthopaedic Association)	Received June 2015 and referred to the AAOS/ABOS Task Force on MOC.	On-going. Board Strategic Discussion held in September 2016. Board Project Team, MOC Alternative Project Team, appointed – final report was presented to the Board at its June 2017 meeting. ABOS Web-Based Longitudinal Assessment (WLA) to be rolled out in 2019. AAOS continues to work with the ABOS to communicate this new initiative.
	BOC/BOS Advisory Opinion #2	Use of the AAOS Clinical Practice Guidelines (CPG) Methodology to Assess the Recertification and Maintenance of Certification (MOC) Processes of the ABOS	Omer Ilahi, MD (Texas Orthopaedic Association)	Received June 2015 and referred to the AAOS/ABOS Task Force on MOC.	AAOS/ABOS Task Force on MOC discussed at its April 21, 2016 teleconference. Methodology not applicable to MOC.
	BOC/BOS Advisory Opinion #3	Explore Alternative Accreditation for Orthopaedic Fellowships	Brian Parsley, MD (American Association of Hip and Knee Surgeons)	Adopted and referred to a new Accreditation Fellowship Project Team.	Fellowship Accreditation Project Team formed in July 2015. Final Project Team report presented to the Board on February 29, 2016. Fellowship Accreditation Task Force appointed in February 2016. On-going – Fellowship Accreditation Task Force presented report to the Board at its March 13, 2017 meeting.
	BOC/BOS Advisory Opinion #4	Equity in Graduate Medical Education (GME Funding)	Michael Aronow, MD and Steven Neufeld, MD (American Orthopaedic Foot & Ankle Society)	Adopted and referred to the Council on Advocacy.	Equity in Graduate Medical Education (GME Funding) was introduced by the AAOS delegation at the AMA House of Delegates November 2015 meeting and was approved by the House of Delegates as AMA Policy.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
	BOC/BOS Advisory Opinion #5	AAOS Recommendation on Mandatory Radiation Safety Awareness Training for Orthopaedic Surgeons	Andrew J. Palafox, MD (Texas Orthopaedic Association)	Adopted and referred to the Patient Safety Committee.	Patient Safety Committee prepared a draft statement on radiation safety. Information Statement approved by the Board at its March 13, 2017 meeting.
	BOC/BOS Advisory Opinion #6	Concerns about Sustainable Growth Rate (SGR) Repeal Bills	Lawrence Halperin, MD (BOC Chair-Elect) and others.	Withdrawn at the request of the sponsors.	No further action required.
Fall 2015 Denver, CO	BOC/BOS Advisory Opinion #1	Increase Class Size and Enhance State Opportunities of the AAOS Leadership Fellows Program (LFP)	Ronald Navarro, MD (Councilor, California Orthopaedic Association)	Received December 2015 and referred to the Leadership Development Committee.	Leadership Development Committee report to Board of Directors in May 2016. Board approved Leadership Development Committee recommendation to maintain current size of the LFP.
Spring 2016 Washington, DC	BOC/BOS Advisory Opinion #1	Request for Legislative Relief Regarding Physician Ownership of Hospitals	Rory Wright, MD and the Wisconsin Orthopaedic Society	Received May 2016 and referred to the Council on Advocacy.	Aggressive legislative outreach program/strategy with PHA and key Hill contacts including PAC events with targeted Members of Congress. Fly-in and Congressional staff briefing held December 2016.
	BOC/BOS Advisory Opinion #2	AAOS Accreditation of Orthopaedic Surgical Facilities	Stephen Eckrich, MD and the South Dakota Orthopaedic Society	Received May 2016.	No further action required.
	BOC/BOS Advisory Opinion #3	Continued Execution of the AAOS Annual Meeting Playground Build	James Slough, MD and the New York State Society of Orthopaedic Surgeons	Received May 2016 and referred to the Communications Cabinet.	Communications created a viable alternative community project – Communities in Motion – that was piloted at the 2017 Annual Meeting in San Diego. Academy Resolution #1: Continuing the Annual Enduring Community Project at the AAOS Annual Meeting was considered at the 2016 Fall Meeting. Resolution voted down by the BOC, BOS and Board of Directors. No further action.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
	BOC/BOS Advisory Opinion #4	Development of an Alternative Pathway for Maintenance of Certification (MOC)	Kevin Shrock, MD and the Florida Orthopaedic Society	Received May 2016 – to be discussed at future Board meeting.	Strategic Discussion held at the September 2016 Board of Director's meeting. Next steps included appointment of Board Project Team on MOC. Final report presented to the Board at its June 2017 meeting. ABOS Web-Based Longitudinal Assessment (WLA) to be rolled out in 2019. AAOS continues to work with the ABOS to communicate this new initiative.
	BOC/BOS Advisory Opinion #5	Preservation of the AAOS Congressional Key Contact Program and Advocacy Resource Committee	Lawrence S. Halperin, MD, BOC Chair; Daniel K. Guy, MD, BOC Chair-Elect; and Basil R. Besh, MD, BOC Secretary	Adopted May 2016.	BOC Advocacy Resource Committee established. Ambassadors recruited for Key Contact Program. Increased participation from 60 to 140 members.
	BOC/BOS Advisory Opinion #6	Enhanced Awareness of the AAOS Board of Councilors (BOC) and Board of Specialty Societies (BOS)	David I. Cannon, MD (Tennessee Orthopaedic Society), and Basil R. Besh, MD (California Orthopaedic Society)	Adopted May 2016.	BOC: Awareness booth at Annual Meeting; video created for state societies; information included in AAOS member welcome packet. BOS: Updated web pages; template reports for inclusion in society newsletters; information included in AAOS member welcome packet. Awareness efforts continue for the BOC and BOS.
Fall 2016 Rosemont, IL	BOC/BOS Advisory Opinion #1	AAOS Support of CMS Removing Total Joint Replacement (TJR) from Inpatient Only List	Richard Biama, MD; Kent Adamson, MD; Basil Besh, MD; Paul Braaton, MD; Michael Klassen, MD; Ronald Navarro, MD; Dori Neill-Cage, MD; Ronald Wyatt, MD (California BOC)	Received December 2016 – Referred to Office of Government Relations and Council on Advocacy to draft report to share with the BOC and BOS and report at the 2017 NOLC.	AAOS comment letter sent to CMS on August 30, 2017. AAOS supports the removal of TKA from the IPO list contingent upon several issues. No further action.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
	BOC/BOS Advisory Opinion #2	Request for Project Team on Orthopaedic Occupational Injuries	Ronald Wyatt, MD (California Orthopaedic Society)	Received December 2016 – Referred to the Patient Safety Committee.	Patient Safety Committee, Healthcare Systems Committee and Membership and Leader Development Committee to review and provide feedback. On-going.
Spring 2017 Washington, DC	BOC/BOS Advisory Opinion #1	Recommend AAOS endorsement of AAHKS Position Statement on the Need for Research on Pre- and Post-Operative Antibiotics	Adolph Yates, MD (AAHKS)	Adopted June 2017.	AAOS to endorse AAHKS position statement to seek further research on the use of pre-operative antibiotics.
	BOC/BOS Advisory Opinion #2	AAOS Efforts to Abolish Maintenance of Certification (MOC) Recertification and Establishment of Alternate Forms of Proficiency.	Robert R. Slater, Jr., MD (Western Orthopaedic Association) and Bryan S. Moon, MD (Texas BOC)	Adopted June 2017.	MOC Alternative Project Team, appointed – final report presented to the Board at its June 2017 meeting. Recommendations have also been shared with the ABOS. ABOS Web-Based Longitudinal Assessment (WLA) to be rolled out in 2019. AAOS continues to work with the ABOS to communicate this new initiative. Ongoing discussions continue with ABOS.
	BOC/BOS Advisory Opinion #3	Evaluation, Reassessment and Modification of AAOS Development of Clinical Practice Guidelines (CPGs), Appropriate Use Criteria (AUCs) and Performance Measures (PMs) Policies and the Possible Elimination of CPGs and AUCs	David L. Cannon, MD, MBA (Tennessee BOC)	Received June 2017.	No further action required.
	BOC/BOS Advisory Opinion #4	Support for Schedule of BOC/BOS Meetings at Roughly Four Month Intervals	Thomas Muzzonigro, MD and Joshua Port, MD (Pennsylvania BOC); Christopher Kontogianis, MD (Washington BOC); Jeffery Angel, MD (Arkansas BOC); Nick DiGiovine, MD (Montana BOC); Rory Wright, MD (Wisconsin BOC)	BOC/BOS did not adopt.	No further action required.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
	BOC/BOS Advisory Opinion #5	Support for the Role and Value of State Orthopaedic Societies	James Slough, MD and Claudette Lajam, MD (New York State Society of Orthopaedic Surgeons) (Pennsylvania BOC)	Adopted June 2017.	Referred to the Department of Society Relations to implement a monthly column in <i>AAOS Now</i> to highlight State Orthopaedic Societies achievements and activities.
	BOC/BOS Advisory Opinion #6	Centralization and Support of Affiliate Mentoring Programs	Alexandra E. Page, MD and Julie Samora, MD (RJS Representatives to BOS)	Received June 2017.	The AAOS and BOS are implementing a three-year pilot plan to formalize the relationships with medical students through Orthopaedic Specialty Interest Groups (OSIGs).
	BOC/BOS Advisory Opinion #7	Support of Orthopaedic Resident/Fellow Engagement at Board of Councilors and Board of Specialty Societies Meetings	Thomas Muzzonigro, MD, Gregory Gallant, MD and Joshua Port, MD (Pennsylvania BOC); Christopher Kontogianis, MD (Washington BOC); Jeffery Angel, MD (Arkansas BOC); Nick DiGiovine, MD (Montana BOC); Rory Wright, MD (Wisconsin BOC)	Received June 2017.	Referred to the Finance Committee for evaluation of the pilot program and recommend to the BOC and BOS if support should be continued.
	BOC/BOS Advisory Opinion #8	Resident Assembly Representation on the AAOS Board of Directors	Susan Williams, MD (Oregon BOC); Thomas Muzzonigro, MD (Pennsylvania BOC); Jeffery Angel, MD (Arkansas BOC); Alexandra Page, MD (ROSS Representative to BOS)	Received June 2017.	Resident Assembly and orthopaedic residency program directors and chairs to explore opportunities for Resident Assembly members to be fully engaged in the life of the AAOS.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
Fall 2017 Dallas, TX	BOC/BOS Advisory Opinion #1	Specialty Society Invited Symposia at the AAOS Annual Meeting	Steve K. Lee, MD (ASSH); Ghazi Rayan, MD (ASSH) Jeffrey A. Greenberg (BOS Rep-ASSH)	Accepted December 2017. Referred to the AAOS Central Program Committee	Central Program Committee recommendation was considered by Board of Directors at March 2018 Board meeting. Central Program Committee recommended that current protocol in place provides sufficient mechanism for specialty society symposia at the Annual Meeting and no further change is needed. The Board approved the Central Program Committee recommendation. No further action.
Spring 2018 Washington, DC	BOC/BOS Advisory Opinion #1	The AAOS Should Consider Utilizing the AJRR Surgeon Specific Data to Allow for Voluntary Public Reporting	Adolph J. Yates, Jr., MD (AAHKS)	Received June 2018. Referred to AJRR.	On-going – AJRR to provide update.
	BOC/BOS Advisory Opinion #2	The AAOS Should Consider Utilizing the Grading of Recommendations, Assessment, Development and Evaluations (GRADE) Methodology to Prepare Clinical Practice Guidelines	Adolph J. Yates, Jr., MD (AAHKS)	WITHDRAWN – No further action required.	No further action.
	BOC/BOS Advisory Opinion #3	The AAOS Should Consider Revision of Current Conflict of Interest Guidelines as Applied to Service on the AAOS Board of Directors	Adolph J. Yates, Jr., MD (AAHKS)	WITHDRAWN – No further action required.	No further action.
	BOC/BOS Advisory Opinion #4	Opposition to the Recognition of the Shoulder as One Anatomic Site	Anthony E. Romeo, MD (ASES); Charles Bush-Joseph, MD (AOSSM); Robert E. Hunter, MD (AANA)	Received June 2018. Referred to the OGR.	On-going – update forthcoming.

DATE & PLACE INTRODUCED	STATEMENT NUMBER	TITLE (as revised by the BOC, BOC/BOS)	SPONSOR	AAOS BOARD ACTION	IMPLEMENTATION
	BOC/BOS Advisory Opinion #5	Position Statement on Firearm Injury	Florida Orthopaedic Society	Received June 2018. Referred to the Communications Cabinet.	Patient Safety Committee and Communications Cabinet developing draft statement for consideration. On-going. Board of Directors to consider statement on firearms safety at its June 2019 Board Meeting.
	BOC/BOS Advisory Opinion #6	AAOS Opposition to Decreased Payment for Medicare Services	Florida Orthopaedic Society	Received June 2018. Referred to the OGR.	On-going – update forthcoming.
	BOC/BOS Advisory Opinion #7	Support for Repeal of MACRA/MIPS	Florida Orthopaedic Society	Received June 2018. Referred to the OGR.	On-going – update forthcoming.
	BOC/BOS Advisory Opinion #8	Inclusion of Federal Healthcare Prescription Drug Monitoring Databases (PDMPs)	David L. Cannon, MD, MBA	Received June 2018. Referred to the Patient Safety Committee and the OGR.	On-going – update forthcoming.
	BOC/BOS Advisory Opinion #9	Inclusion of Methadone in Prescription Drug Monitoring Databases (PDMPs)	David L. Cannon, MD, MBA	Received June 2018. Referred to the Patient Safety Committee and the OGR.	On-going – update forthcoming.
	BOC/BOS Advisory Opinion #10	Expansion of Resources for Hospital Employed Orthopaedic Surgeons	Jeffery D. Angel, MD and David L. Cannon, MD, MBA	Resolved A: Received June 2018. Referred to the Council on Education and the Office of General Counsel. Resolved B: Received June 2018. Referred to the Office of General Counsel.	Symposium to be held at 2018 Fall Meeting.

Fall 2018 San Antonio, TX	AAOS Advisory Opinion #1	The AAOS should consider revision of the current conflicts of interest guidelines as applied to service on the AAOS Board of Directors.	Julie Samora, MD; Adolph J. Yates, MD; David Polly, MD; Hassan Mir, MD; Antonia Chen, MD; Eeric Truumees, MD	Received and referred to the Committee on Ethics and Outside Interests to revise Guidance Document based on feedback from the Board of Directors.	Board of Directors considered and revisions to Guidance Document in April 2019. Communication distributed to BOS COI Task Force.
	AAOS Advisory Opinion #2	The AAOS should consider clarification and standardization of the process for creation of Plans for Active Management (PAMs)	Adolph J. Yates, MD; Julie Samora, MD; David Polly, MD; Antonia Chen, MD; Hassan Mir, MD; Eeric Truumees, MD	Received and referred to the Committee on Ethics and Outside Interests.	Committee on Ethics and Outside Interests documented the PAM process. Communication distributed to BOS COI Task Force.
	AAOS Advisory Opinion #3	Disaster Preparedness	Daniel K. Guy, MD; Roman Hayda, MD; Pablo Marrero, MD; Andrew N. Pollak, MD; Jennifer M. Weiss, MD; David Teague, MD; and David D. Teuscher, MD	Received.	President's Symposium at 2019 Annual Meeting focused on Disaster Preparedness. Disaster Preparedness kiosk information will be uploaded to education platform for availability at all meetings.
NOLC 2019 Washington, DC	AAOS Advisory Opinion #1	American Board of Orthopaedic Surgery (ABOS) Nomination from the BOC	Alan Greenwald, MD	Adopted and referred to AAOS Presidential Line to communicate to the ABOS and AAOS Nominating Committee	Information shared with ABOS and AAOS Nominating Committee. The AAOS Nominating does not consider nominations to the ABOS for 2020.
	AAOS Advisory Opinion #2	Improving Terminology Regarding Diversity	Omer A. Ilahi, MD	Received and referred to the Diversity Advisory Board and the Council on Research and Quality	Diversity Advisory Board and Council on Research and Quality reviewing information and will jointly prepare a guideline for consideration.
Fall Meeting 2019 Nashville, TN	AAOS Advisory Opinion #1	"Limb Deformity" Category at AAOS Annual Meeting	Limb Lengthening and Reconstruction Society	Received and referred to AAOS Annual Meeting Committee	Annual Meeting Committee report to Board of Directors – February 2020 – LLRS encouraged to co-brand with AAOS on ICLs

	AAOS Advisory Opinion #2	AAOS and State Societies	Alan Greenwald, MD	Received and referred to staff to explore options and report back to the Board of Directors	AAOS staff exploring options for potential reciprocal dues options – Report expected to Board of Directors in December 2021
Virtual 2020 Fall Meeting	AAOS Advisory Opinion #1	Developing Pediatric Specific Review of Novel Devices at the United States Food and Drug Administration	Scoliosis Research Society	Received and referred to Research and Quality Council and the Advocacy Council	Update TBD

Updated: September 2021

2021 Combined NOLC/Fall Meeting
Five Year Review of AAOS Resolutions

Academy Resolution #1

Public Relations Efforts of the American Academy of Orthopaedic Surgeons

Academy – R1992A

Adopted 1992; modified and retained 2002 and 2007, retained 2012 and 2017

- A. **Resolved**, that in such vital areas as advocacy, research, public and patient education and media relations, the American Academy of Orthopaedic Surgeons shall, in cooperation with affiliated musculoskeletal care givers, place a high priority on representing orthopaedic surgeons as highly qualified and compassionate professionals who care for the diseases of the entire musculoskeletal system. [Retain] (R1992A1)
- B. **Resolved**, that the American Academy of Orthopaedic Surgeons shall appropriately fund and staff the Academy's Communications Cabinet to carry out this high priority and to coordinate the organization's member communications efforts. [Retain] (R1992A2)

September 2021 Recommendation of Board of Councilors:

September 2021 Recommendation of Board of Specialty Societies:

December 2021 Recommendation of Board of Directors:

Association Resolution #2

Reduced Medicare Fees for Orthopaedic Surgeons

Association – R-1992B

Adopted 1992; modified and retained 1997 and 2002; retained 2007; modified and retained 2012; retained 2017

- A. **Resolved**, that the American Association of Orthopaedic Surgeons shall support negotiations to eliminate inequities in physician fee schedule and shall continue its membership in the AMA/Specialty Society Relative Value Scale (RVS) Update Committee; [Retain] (R1992B1)
- B. **Resolved**, that the American Association of Orthopaedic Surgeons shall continue to monitor and offer suggestions on improving: methods of updating and correcting inappropriate physician work values; inappropriate values for Evaluation and Management (E & M) codes; and other potential vulnerabilities in the physician payment system. [Retain] (R1992B2)
- C. **Resolved**, that the American Association of Orthopaedic Surgeons shall continue coalition-building with other national medical associations and public interest groups to address these serious issues.
[Retain] (R1992B3)

September 2021 Recommendation of Board of Councilors:

September 2021 Recommendation of Board of Specialty Societies:

December 2021 Recommendation of Board of Directors:

2021 Combined NOLC/Fall Meeting Bylaws Amendment #1

Submitted by:

Joshua Port, MD, FAAOS
Ricardo J. Rodriguez, MD, FAAOS
Chip Hummer, MD, FAAOS, FACS
Samantha A. Spencer, MD, FAAOS
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David Pula, MD, FAAOS
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Andrea Herzka, MD, FAAOS

BYLAWS OF THE AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS®

(Incorporated February, 1998)
(Amended May 15, 2021)

ARTICLE V - PROFESSIONAL COMPLIANCE PROGRAM

5.1 Levels of Professional Compliance Actions

The Board of Directors may reprimand, censure, suspend or expel any Fellow or Member by a two-thirds (2/3rds) vote of the Board members present and voting. The levels of professional compliance action shall be defined as follows:

a. Reprimand

A reprimand shall be a written sanction, reprimanding the Fellow or Member, with no loss of the benefits of Fellowship or Membership for the finding of a violation of one, and only one, Standard of Professionalism. Such reprimand shall be made a part of the membership file of the Fellow or Member.

b. Censure

A censure shall be a written sanction, censuring the Fellow or Member, with no loss of the benefits of Fellowship or Membership for the finding of a violation of one or more Standards of Professionalism. Such censure shall be made a part of the membership file of the Fellow or Member. A Fellow or Member who has been censured by the Board of Directors may apply for ASSOCIATION OR ACADEMY volunteer opportunities, however the Board of Directors reserves the right to consider the professional compliance action in making any committee or volunteer appointments.

c. Suspension

A suspension shall be a written sanction, causing the Fellow or Member to lose the benefits of Fellowship or Membership for a period of time as determined by the Board of Directors, after which the individual may be ~~fully~~ reinstated upon the request of the individual, provided he or she pays all past dues, fees or special assessments owing upon reinstatement. Suspension shall be for such term as the Board determines is necessary to ensure modification of behavior. Notwithstanding the foregoing, a Fellow or Member who has successfully reinstated into Fellowship or Membership may apply for ASSOCIATION or ACADEMY volunteer opportunities; however, the Board of Directors

**BYLAWS OF THE
AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS®**
(Amended May 15, 2021)

reserves the right to consider the professional compliance action in making any committee or volunteer appointments.

d. Expulsion

An expulsion shall be a written sanction, causing the Fellow or Member to be removed from the rolls of the ASSOCIATION. An expelled Fellow or Member shall not be entitled to any of the benefits of Fellowship or Membership. The ASSOCIATION shall accept a reapplication for Fellowship or Membership from an expelled Fellow or Member provided he or she meets all requirements to apply to become a Fellow or Member.

Submitted by: AAOS Board of Directors

AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS
ARTICLE IV - MEMBER CLASSIFICATIONS, REQUIREMENTS AND RIGHTS
 PROPOSED CHANGES SHOWN IN UNDERLINING AND ~~STRIKETHROUGH~~

4.2 Fellow

Fellow shall consist of three classifications: Active, Inactive and Emeritus.

4.2.a Fellow - Active

To be eligible to become an Active Fellow, an individual must meet the following requirements:

- a. Is certified by the American Board of Orthopaedic Surgery (ABOS), the American Osteopathic Board of Orthopaedic Surgery (AOBOS), or the Royal College of Physicians and Surgeons of Canada (RCPSC);
- b. ~~For three years immediately prior to induction, devote his or her medical practice exclusively to orthopaedic surgery or engage in the teaching of orthopaedic surgery or research related to the musculoskeletal system~~
- c. Practices in the United States or Canada; and
- d. Maintains a full, unrestricted and unlimited license to practice medicine in the United States or Canada in which he or she practices or provides evidence of full-time medical service in the federal government which does not require a medical license.

Active Fellows shall have the right to vote, hold office and serve on any committee or task force.

4.2.b Fellow – Inactive

To be eligible to become a Fellow – Inactive, an individual must meet the following requirements:

- a. Is an Active Fellow;
- b. Is incapacitated for a period of more than six (6) months; and
- c. Is unable to engage in the practice of medicine or to assume duties of a medically-oriented nature because of the incapacity.

Inactive Fellows may vote, but shall not hold office or serve on any committee or task force.

4.2.c Fellow – Emeritus

To be eligible to become a Fellow - Emeritus, an individual must meet the following requirements:

- a. Is an Active Fellow in good standing for at least twenty-five (25) years ~~or more consecutively~~; and
- b. Is completely retired from the practice of medicine.

Fellow – Emeritus may vote and serve as a member of ~~on~~ any committee or task force.

4.3 International Member

International Member shall consist of two classifications: Orthopaedic Surgeon and Resident.

4.3.a International Member –Orthopaedic Surgeon

To be eligible to become an International Member, an individual must meet the following requirements:

- a. Is an orthopaedic surgeon practicing outside the United States or Canada;
- b. Is a member in good standing in one of the national orthopaedic organizations of the country in which the individual practices, or, where no national orthopaedic organizations exists, proof of orthopaedic licensure;
- c. Devotes his or her medical practice to orthopaedic surgery or is engaged in the teaching of orthopaedic surgery or research related to the musculoskeletal system; and
- d. Maintain a full, unrestricted and unlimited license to practice medicine (or its equivalent) in the country in which he or she practices;

An International Member may attend and participate in meetings and may serve as a member of any committee or task force, but may not vote or hold office.

4.3.b International Member –Resident

To be eligible to become an International Member –Resident, an individual must meet all the following requirements:

- a. Is a physician residing outside of the United States or Canada who has commenced the study of orthopaedics;
- b. Is enrolled in an orthopaedic residency program recognized by the national orthopaedic organization of the country in which the residency program is located or those who have successfully completed such an orthopaedic residency and are in a non US or Canadian fellowship program.

An International Member – Resident may attend and participate in meetings and may serve as a member of any committee or task force, but may not hold office or vote.

4.3.c International Member – Emeritus

To be eligible to become an International Member - Emeritus, an individual must meet the following requirements:

- a. Is an International Member in good standing for at least twenty-five (25) consecutive years; and

- b. Is completely retired from the practice of medicine.

International Member – Emeritus may attend and participate in meetings and may serve as a member of any committee or task force, but may not vote or hold office.

4.4 Candidate Member

Candidate Membership shall consist of four (4) classifications: Orthopaedic Surgeon, Resident and Medical Student.

4.4.a Candidate Member – Orthopaedic Surgeon

To be eligible to become a Candidate Member – Orthopaedic Surgeon, an individual must meet the following requirements:

- a. Is a physician who has successfully completed a Residency Review Committee, American Osteopathic Association, or Canadian-approved orthopaedic residency or subsequent fellowship;
- b. Has the intention to apply for Active Fellowship within five (5) years of completing orthopaedic residency or subsequent fellowship program; and
- c. Maintains a full, unrestricted, and unlimited license to practice medicine in the United States or Canada or gives evidence of full-time medical service in the federal government which does not require licensure.

Upon meeting the criteria of Section 4.2.a, a Candidate Member – Orthopaedic Surgeon may apply for Fellow status.

A Candidate Member – Orthopaedic Surgeon may participate in meetings and may serve as a member of any committee or task force, but may not hold office or vote.

4.4.b Candidate Member – Resident

To be eligible to become a Candidate Member - Resident, an individual must meet all the following requirements:

- a. Has commenced the study of orthopaedics; and
- b. Is a physician enrolled in an Accreditation Council of Graduate Medical Education, American Osteopathic Association, or Royal College of Physicians and Surgeons of Canada approved orthopaedic residency program or who has successfully completed such an orthopaedic residency and is in a US or Canadian fellowship program.

A Candidate Member – Resident may participate in meetings and may serve as a member of any committee or task force, but may not hold office or vote.

4.4.c Candidate Member – Medical Student

To be eligible to become a Candidate Member – Medical Student, an individual must meet all the following

requirements:

- a. Is enrolled in a medical school accredited by the Liaison Committee on Medical Education, the American Osteopathic Association, the Association of Faculties of Medicine of Canada, or the World Federation for Medical Education; and
- b. Have an interest in pursuing a career in orthopaedics.

A Candidate Member – Medical Student may participate in meetings and participate in task forces, but may not serve on any committee, hold office, or vote.

4.4.d Candidate Member – Inactive

To be eligible to become a Candidate Member – Inactive, an individual must meet the following requirements:

- a. Is incapacitated for a period in excess of six (6) months; and
- b. Is unable to engage in the practice of medicine or to assume duties of a medically- oriented nature because of the incapacity.

Candidate Member – Inactive may not vote, hold office, or serve on any committee or task force.

4.5 Affiliate – Orthopaedic Surgeon

To be eligible to become an Affiliate – Orthopaedic Surgeon, an individual must meet the following requirements:

- a. Is an orthopaedic surgeon practicing in the United States or Canada who
 - i. has successfully completed a Residency Review Committee, American Osteopathic Association, or Canadian-approved orthopaedic residency or subsequent fellowship and has not completed the board certification process within five (5) years of completing residency or fellowship; or
 - ii. has successfully completed the study of orthopaedics in an international orthopaedic residency program recognized by the national orthopaedic organization of the country in which the individual trained; and
- b. Maintains a full, unrestricted and unlimited license to practice medicine in the United States or Canada or gives evidence of full-time medical service in the federal government which does not require licensure.

An Affiliate – Orthopaedic Surgeon may participate in meetings and may serve as a member of any committee or task force, but may not hold office or vote.

4.6 Allied Member

Allied Membership shall consist of three (3) classifications: Orthopaedic Team, Orthopaedic Research and Physician.

4.6.a Allied Member – Orthopaedic Team

To be eligible to become an Allied Member – Orthopaedic Team, an individual must meet all the following requirements:

- a. Is a licensed nurse, physician assistant, physical therapist, athletic trainer or practice administrator;
- b. Is employed in the United States or Canada at a medical institution, academic medical center or a military facility or for the Veterans Affairs;
- c. Is working in an orthopaedic setting under the supervision of a Fellow or Candidate Member; and
- d. Is recommended by a Fellow or a Candidate Member who provides supervision for the individual.

An Allied Member – Orthopaedic Team may attend and participate in meetings and may participate in task forces but may not serve on any committee, hold office or vote.

4.6.b Allied Member – Orthopaedic Research

To be eligible to become an Allied Member – Orthopaedic Research, an individual must meet all the following requirements:

- a. Holds a doctorate degree or its equivalent;
- b. Engages in research or basic science related to orthopaedic surgery at a medical institution, academic medical center or a military facility or for the Veterans Affairs; and
- c. Has demonstrated achievement in research and education related to orthopaedic surgery.

An Allied Member – Research may participate in meetings and may serve as a member of a committee or task force, but may not hold office or vote.

4.6c. Allied Member - Physician

To be eligible to become an Allied Member – Physician, an individual must meet the following requirements:

- a. Is a distinguished physician who is not an orthopaedic surgeon;
- b. Holds the degrees of M.D. or D.O; and
- c. Engages in activities, interests and contributions related to orthopaedic surgery.

An Allied Member – Physician may participate in meetings and may serve as a member of any committee or task force, but may not vote or hold office.

4.7 Honorary Member

The status of Honorary Member may be conferred upon an individual by two thirds (2/3rds) vote of the Board of Directors present and voting.

An Honorary Member may attend and participate in meetings, but may not serve on any committee or task force, hold office or vote.

FOLLOWING ARE CURRENT BYLAWS – SHOWN WITH STRIKETHROUGH – FOLLOWING ADOPTION OF THE PROPOSED AMENDMENTS #2 ABOVE, THESE SECTIONS WILL BE REMOVED FROM THE ASSOCIATION BYLAWS.

~~4.3—Associate Member~~

~~Associate Membership shall consist of thirteen (13) classifications; Allied Specialties, Basic Sciences, Orthopaedic, Resident, International Resident, Candidate, Orthopaedic Candidate, International, Physician Assistant, Medical Student, Emeritus, Inactive and Honorary.~~

~~4.3.a—Associate Member—Allied Specialties~~

~~To be eligible to become an Associate Member—Allied Specialties, an individual must meet the following requirements:~~

- ~~d.—Is a distinguished physician who is not an orthopaedic surgeon;~~
- ~~e.—Holds the degrees of M.D. or D.O; and~~
- ~~f.—Engages in activities, interests and contributions related to orthopaedic surgery.~~

~~An Associate Member—Allied Specialties may participate in meetings and may serve on any committee or task force, but may not hold office or vote.~~

~~4.3.b—Associate Member—Basic Sciences~~

~~To be eligible to become an Associate Member—Basic Sciences, an individual must meet the following requirements:~~

- ~~d.—Holds a doctorate degree or its equivalent;~~
- ~~e.—Engages in research or basic science related to orthopaedic surgery; and~~
- ~~f.—Has demonstrated achievement in research and education related to orthopaedic surgery.~~

~~An Associate Member—Basic Sciences may participate in meetings and may serve on a committee or task force, but may not hold office or vote.~~

4.3.c — Associate Member — Orthopaedic

To be eligible to become an Associate Member — Orthopaedic, an individual must meet the following requirements:

- a. ~~Is a qualified orthopaedic surgeon who, because of exceptional circumstances, does not meet the Fellow — Active requirements;~~
- b. ~~For three years immediately prior to induction, devotes his or her medical practice exclusively to orthopaedic surgery or engages in the teaching of orthopaedic surgery or research related to the musculoskeletal system;~~
- c. ~~Maintains a full, unrestricted and unlimited license to practice medicine in the United States or Canada in which he or she practices or provide evidence of full time medical service in the federal government which does not require a medical license; and~~
- d. ~~U.S. trained orthopaedic surgeons who were eligible but did not sit for the ABOS, AOBOS, or RCPSC examination or who failed the examination are explicitly excluded from this membership classification. Internationally trained orthopaedic surgeons are eligible for this membership classification.~~

~~An Associate Member — Orthopaedic may participate in meetings and may serve on any committee or task force, but may not hold office or vote.~~

4.3.d — Associate Member — Resident

To be eligible to become an Associate Member — Resident, an individual must meet all the following requirements:

- c. ~~Commenced the study of orthopaedics with the intention of applying for Active Fellowship; and~~
- d. ~~Is a physician enrolled in an Accreditation Council of Graduate Medical Education, American Osteopathic Association, or Royal College of Physicians and Surgeons of Canada approved orthopaedic residency program or who has successfully completed such an orthopaedic residency and is in a US or Canadian fellowship program.~~

~~An Associate Member — Resident may participate in meetings and may serve on any committee or task force, but may not hold office or vote.~~

4.3.e — Associate Member — International Resident

To be eligible to become an Associate Member — International Resident, an individual must meet all the following requirements:

- c. ~~Is a physician residing outside of the United States or Canada who has commenced the study of orthopaedics;~~
- d. ~~Has the intention of applying for Associate Member — International; and~~
- e. ~~Is enrolled in an orthopaedic residency program recognized by the national orthopaedic~~

~~organization of the country in which the residency program is located or those who have successfully completed such an orthopaedic residency and are in a non-US or Canadian fellowship program.~~

~~An Associate Member — International Resident may attend and participate in meetings and may serve on any committee or task force, but may not hold office or vote.~~

~~4.3.f — Associate Member — Candidate~~

~~To be eligible to become an Associate Member — Candidate, an individual must meet all the following requirements:~~

- ~~a. — Is a physician who has successfully completed a Residency Review Committee, American Osteopathic Association, or Canadian approved orthopaedic residency or subsequent fellowship;~~
- ~~b. — Has the intention to apply for Active Fellowship within five years of completing orthopaedic residency or subsequent fellowship program; and~~
- ~~c. — Maintains a full, unrestricted, and unlimited license to practice medicine in the United States or Canada or gives evidence of full-time medical service in the federal government which does not require licensure.~~

~~An Associate Member — Candidate may attend and participate in meetings and may serve on any committee or task force, but may not hold office or vote.~~

~~4.3.g — Associate Member — Orthopaedic Candidate~~

~~To be eligible to become an Associate Member — Orthopaedic Candidate, an individual must meet the following requirements:~~

- ~~c. — Is a physician practicing in the United States who has successfully completed the study of orthopaedics in an international orthopaedic residency program recognized by the national orthopaedic organization of the country in which the individual trained;~~
- ~~d. — Has the intention to apply for Associate Member — Orthopaedic within five years of completing residency or fellowship training; and~~
- ~~e. — Maintains a full, unrestricted and unlimited license to practice medicine in the United States or Canada or gives evidence of full-time medical service in the federal government which does not require licensure.~~

~~An Associate Member — Orthopaedic Candidate may participate in meetings and may serve on any committee or task force, but may not hold office or vote.~~

~~4.3.h — Associate Member — International~~

~~To be eligible to become an Associate Member — International, an individual must meet all the following~~

requirements:

- e. ~~Is an orthopaedic surgeon practicing outside the United States or Canada;~~
- f. ~~Is a member in good standing in one of the national orthopaedic organizations of the country in which the individual practices, or, where no national orthopaedic organizations exists, proof of orthopaedic licensure;~~
- g. ~~Devotes his or her medical practice to orthopaedic surgery or is engaged in the teaching of orthopaedic surgery or research related to the musculoskeletal system; and~~
- h. ~~Maintain a full, unrestricted and unlimited license to practice medicine (or its equivalent) in the country in which he or she practices;~~

~~An Associate Member — International may attend and participate in meetings and may serve on any committee or task force, but may not hold office.~~

4.3.i ~~Associate Member — Physician Assistant~~

~~To be eligible to become an Associate Member — Physician Assistant, an individual must meet all the following requirements:~~

- d. ~~Is a certified physician assistant;~~
- e. ~~Is employed in the United States or Canada;~~
- f. ~~Is working in an orthopaedic setting under the supervision of a Fellow or Associate Member; and~~
- e. ~~Is recommended by a Fellow or an Associate Member who provides the Physician Assistant supervision.~~

~~An Associate Member — Physician Assistant may attend and participate in meetings and may participate in task forces but may not serve on any committee, hold office or vote.~~

4.3.j ~~Associate Member — Medical Student~~

~~To be eligible to become an Associate Member — Medical Student, an individual must meet all the following requirements:~~

- c. ~~Is enrolled in a medical school accredited by the Liaison Committee on Medical Education, the American Osteopathic Association, the Association of Faculties of Medicine of Canada, or the World Federation for Medical Education; and~~
- d. ~~Have an interest in pursuing a career in orthopaedics.~~

~~An Associate Member — Medical Student may participate in meetings and participate in task forces, but may not serve on any committee, hold office, or vote.~~

~~4.3.k Associate Member — Emeritus~~

~~To be eligible to become an Associate Member — Emeritus, an individual must meet the following requirements:~~

- ~~a. — Is an Associate Member in good standing for at least twenty-five (25) years; and~~
- ~~b. — Is completely retired from the practice of medicine.~~

~~Associate Member — Emeritus may participate in meetings and may serve on any committee or task force, but may not hold office or vote.~~

~~4.3.l Associate Member — Inactive~~

~~To be eligible to become an Associate Member — Inactive, an individual must meet the following requirements:~~

- ~~c. — Is incapacitated for a period in excess of six (6) months; and~~
- ~~d. — Is unable to engage in the practice of medicine or to assume duties of a medically-oriented nature because of the incapacity.~~

~~Associate Member — Inactive may not vote, hold office, or serve on any committee or task force.~~

~~4.3.m Associate Member — Honorary~~

~~The status of Associate Member — Honorary may be conferred upon an individual by two-thirds (2/3rds) vote of the Board of Directors present and voting.~~

~~An Associate Member — Honorary may attend and participate in meetings, but may not serve on any committee or task force, hold office or vote.~~

Submitted by: AAOS Board of Directors

AMERICAN ACADEMY OF ORTHOPAEDIC SURGEONS
ARTICLE III - STATUS AND CATEGORIES OF MEMBERSHIP AND FELLOWSHIP
ARTICLE IV - FELLOWSHIP AND MEMBERSHIP
 PROPOSED CHANGES SHOWN IN UNDERLINING AND STRIKETHROUGH

ARTICLE III - STATUS AND CATEGORIES OF MEMBERSHIP, ~~AND FELLOWSHIP~~ AND AFFILIATES

3.1 Status of Fellowship, ~~and Membership~~ and Affiliate

Fellowship, ~~and Membership~~ and Affiliate status in the ACADEMY is a privilege, not a right, and is dependent upon the applicant adequately demonstrating compliance with the requirements for Fellowship, ~~or Membership~~ or Affiliate status as contained in the Articles of Incorporation, the Bylaws, the Rules and Regulations, Standards of Professionalism and policy statements adopted by the Fellowship or Board of Directors of the ACADEMY or the Fellowship or Board of Directors of the AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS.

3.2 Unified and Reciprocal Fellowship, ~~and Membership~~ and Affiliate Status

All Fellows, ~~and Members~~ and Affiliates of the ACADEMY shall be considered Fellows, ~~and Members~~ and Affiliates of the AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS. All Fellows, ~~and Members~~ and Affiliates of the AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS shall be considered Fellows, ~~and Members~~ and Affiliates of the ACADEMY, except as otherwise provided in the Bylaws of the AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS.

3.3 Non-Discrimination

The ACADEMY does not discriminate on the basis of race, color, gender, sexual orientation, religion, or national origin, or on any basis that would constitute illegal discrimination.

3.4 Categories of Membership

There shall be ~~two~~ five (5) categories of membership in the ACADEMY: Fellows, ~~and International Members,~~ Candidate Members, Affiliate - Orthopaedic Surgeons and Allied Members.

ARTICLE IV - FELLOWSHIP AND MEMBERSHIP

4.1 Rights and Classes of Fellowship, ~~and Membership~~ and Affiliates

All classes and requirements of Fellowship, ~~and Membership~~ and Affiliates in the ACADEMY shall be the same as those of the AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS.

4.2 Professional Compliance Actions Regarding Fellows and Members

Any act by the Board of Directors of the AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS to reprimand, censure, suspend or expel any Fellow, ~~or Member~~ or Affiliate of the ASSOCIATION shall affect, in the same manner, the status of such Fellow, ~~or Member~~ or Affiliate in the ACADEMY.



AMERICAN ACADEMY OF
ORTHOPAEDIC SURGEONS

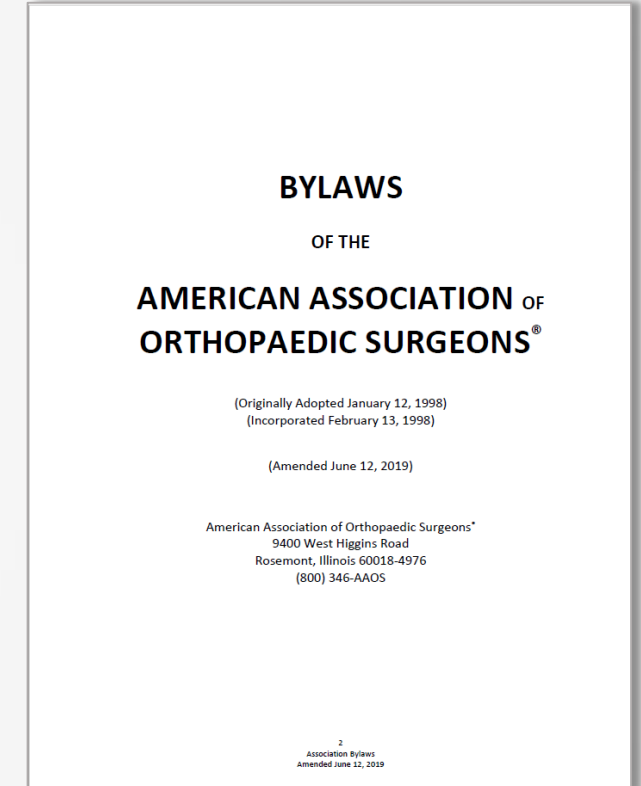
AMERICAN ASSOCIATION OF
ORTHOPAEDIC SURGEONS

Membership Update & Proposed 2022 Bylaws Amendment

Membership Categories

Proposed Bylaws Amendments – Membership Categories

- Membership Council has proposed changes to Association Bylaws Article IV
 - Simplify AAOS membership categories by reducing 16 categories down to 5 categories
 - Add membership categories to capture groups currently excluded
 - Permit orthopaedic surgeons without board certification to be AAOS members



Category I – Fellows – Proposed Eligibility Criteria



Orthopaedic Surgeon certified by ABOS, AOBOS or RCPSC



~~For 3 years, practice devoted to practicing/teaching/research in orthopaedics~~



Practices orthopaedic surgery in US or Canada



Full, unrestricted medical license in US or Canada or show government service



ONLY Fellows are eligible to vote and hold office



Eligible to serve on any committee and task force

Category I - Fellows

- Inactive or Emeritus Status:

- Inactive Status – granted upon request to Fellows who

- Have been incapacitated for 6 months
 - Unable to practice medicine or assume duties of a medically oriented nature due to incapacity
 - May vote but cannot hold office or serve on a committee or task force

- Emeritus Status – granted upon request to Physician Members who

- Have been a member in good standing for 25+ years consecutively
 - Are completely retired from the practice of medicine
 - May vote or serve as a member of a committee or task force

Category II – International Members - Proposed Eligibility Criteria

- International Member is:



Orthopaedic Surgeon and practicing outside US/Canada



OR Successfully completed an international orthopaedic residency program



Member in good standing of national orthopaedic organization



Practice devoted to orthopaedic surgery, including academia or research



Full, unrestricted medical license in the country of practice



Ineligible to vote or hold office



Eligible to serve as member of committees and task forces

Category II – International Resident – Proposed Eligibility Criteria

- International Resident is:



Physician residing outside US/Canada



Enrolled in a residency program recognized by national ortho organization



OR has enrolled in a non-US/Canada fellowship program



May apply for International Member status when eligibility criteria is met



Ineligible to vote or hold office



Eligible to serve as member of committees and task forces

Category II – International Members

- Inactive or Emeritus Status:

- ~~• Inactive Status – granted upon request to International Members who~~
 - ~~• Have been incapacitated for 6 months~~
 - ~~• Unable to practice medicine or assume duties of a medically oriented nature due to incapacity~~

Recommendation: Inactive status unnecessary. International numbers fluctuate annually depending on whether the members attend the annual meeting.

- Emeritus Status – granted upon request to International Members who
 - Have been a member in good standing for 25+ years consecutively
 - Are completely retired from the practice of medicine
- **Rights**: Inactive or Emeritus International Members are unable to vote or hold office but may attend and participate in meetings and serve as a member of a committee or task force

Category III – Candidate Member Categories – Proposed Eligibility Criteria

- Orthopaedic Surgeons practicing in US/Canada
 - Board eligible
- Residents - US/Canadian
 - Fellowship – US/Canadian
- Medical Students

Category III - Candidate Members – Proposed Eligibility Criteria

- Orthopaedic Surgeon is:

NOTE: Captures members who are board-eligible, including Medical students, residents, and “candidate” members



Physician who successfully completed an approved residency or fellowship



Maintains a full, unrestricted medical license in US/Canada



May apply for Fellow status when eligibility criteria is met



Ineligible to vote or hold office



Eligible to serve as member of committees and task forces

Category III - Candidate Members – Proposed Eligibility Criteria

- Resident/Fellowship Member is:



Enrolled in orthopaedic residency program approved by ACGME, AOA or RCPS



OR Has successfully completed residency and is in a US/Canadian Fellowship



Ineligible to vote or hold office



Eligible to serve as member of committees and task forces

Category III - Candidate Members – Proposed Eligibility Criteria

- Medical Student is:



Enrolled in accredited US, Canadian or international medical school



Interested in career in orthopaedic surgery



Ineligible to vote or hold office



Eligible to serve as member of committees and task forces

Category III - Candidate Members

- Inactive Status – granted upon request to Candidate Members who
 - Have been incapacitated for 6 months
 - Unable to practice medicine or assume duties of a medically oriented nature due to incapacity
- Emeritus Status – granted upon request to Candidate Members who
 - Have been a member in good standing for 25+ years consecutively
 - Is completely retired from employment in a musculoskeletal-related area
 - Resident Members are ineligible for Emeritus status
- **Rights**: Inactive or Emeritus Candidate Members are unable to vote or hold office but may attend and participate in meetings and serve as a member of a committee or task force

Category IV – Orthopaedic Surgeon Affiliate – Proposed Eligibility Criteria

- Orthopaedic Surgeons practicing in US/Canada
 - Has not passed the Board Examination within the 5 year post-training time frame (after Residency and/or Fellowship) or is not seeking board certification
 - Trained outside US/Canada but living in the United States

Category IV – Orthopaedic Surgeon Affiliate– Proposed Eligibility Criteria

- Orthopaedic Surgeon (US) is:

NOTE: Captures members who are not board-eligible, whether due to not passing the boards, or being internationally trained or choosing not to seek certification



Physician who successfully completed an approved residency or fellowship



Maintains a full, unrestricted medical license in US/Canada **OR**



Internationally trained orthopaedic surgeon living in the United States



May **NOT** apply for Fellow status until eligibility criteria is met



Ineligible to vote or hold office



Eligible to serve as member of committees and task forces

Category V – Allied Member Categories – Proposed Eligibility Criteria

- Orthopaedic Team
 - Licensed Nurse, PA, PT, AT or practice administrator
- Orthopaedic Research
 - Doctorate degree or equivalent

Category V - Allied Members – Proposed Eligibility Criteria

- Orthopaedic Team Member is:



Licensed nurse, PA, physical therapist, athletic training or administrator



Employed in an orthopaedic setting in US/Canada at medical institution, AMC or VA/Military facility



Supervised and recommended by Fellow or Member



Ineligible to vote, hold office or serve as committee member



Ineligible for Inactive or Emeritus status



May participate in meetings and serve on task forces

Category V - Allied Members – Proposed Eligibility Criteria

•Orthopaedic Researcher:



Holds a doctorate degree or equivalent degree



Engages in research/basic science related to orthopaedic surgery at medical institution, AMC or VA/Military facility



Demonstrated achievement in research/education related to orthopaedic surgery



Ineligible to vote or hold office



Ineligible for Inactive or Emeritus status



Eligible to serve as member of committee or task force and participate in meetings

Category V – Allied Members - Proposed Eligibility Criteria

- Physician is:



Distinguished M.D. or D.O.



Not an orthopaedic surgeon, chiropractor, or podiatrist



Engaged in activities, interests or contributions related to orthopaedic surgery



Ineligible to vote or hold office



Eligible to serve as member of committees and task forces

Honorary Members

- Honorary Member is:



Status awarded by Board of Directors – 2/3rds of members present and voting



Ineligible to vote, hold office or serve on a committee or task force



Ineligible for Inactive or Emeritus status



May attend and participate in meetings

QUESTIONS?



Appendix

Membership Category Analysis: Review of Similar Organizations

American Medical Association (AMA)

Does not require BC for Physician Members, no limit on YIP, Dues Scale based on # YIP.

American Academy of Pediatrics (AAP)

Has Candidate Category, “Board Eligible” but no specification on term limit, must have completed pediatric residency, Fellow category has no limit on # of years in practice for eligibility.

American College of Cardiology (ACC)

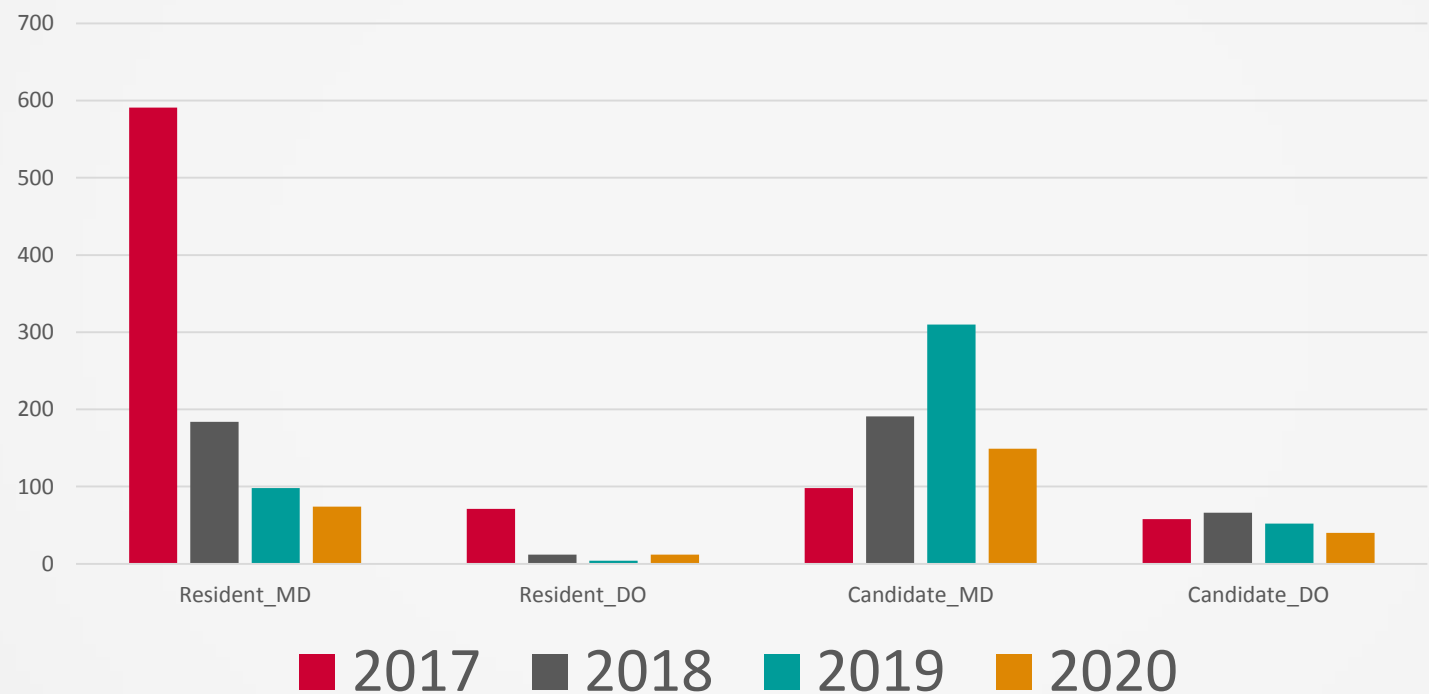
Fellow: Must be BC but can be within six months of completing their training or early career cardiologists who have completed training in the last three years are encouraged to apply.

American College of Surgeons (FACS)

Fellow: be in practice for 1 year, must be board certified to practice. Associate category is limited to 6 years (candidate equivalent).

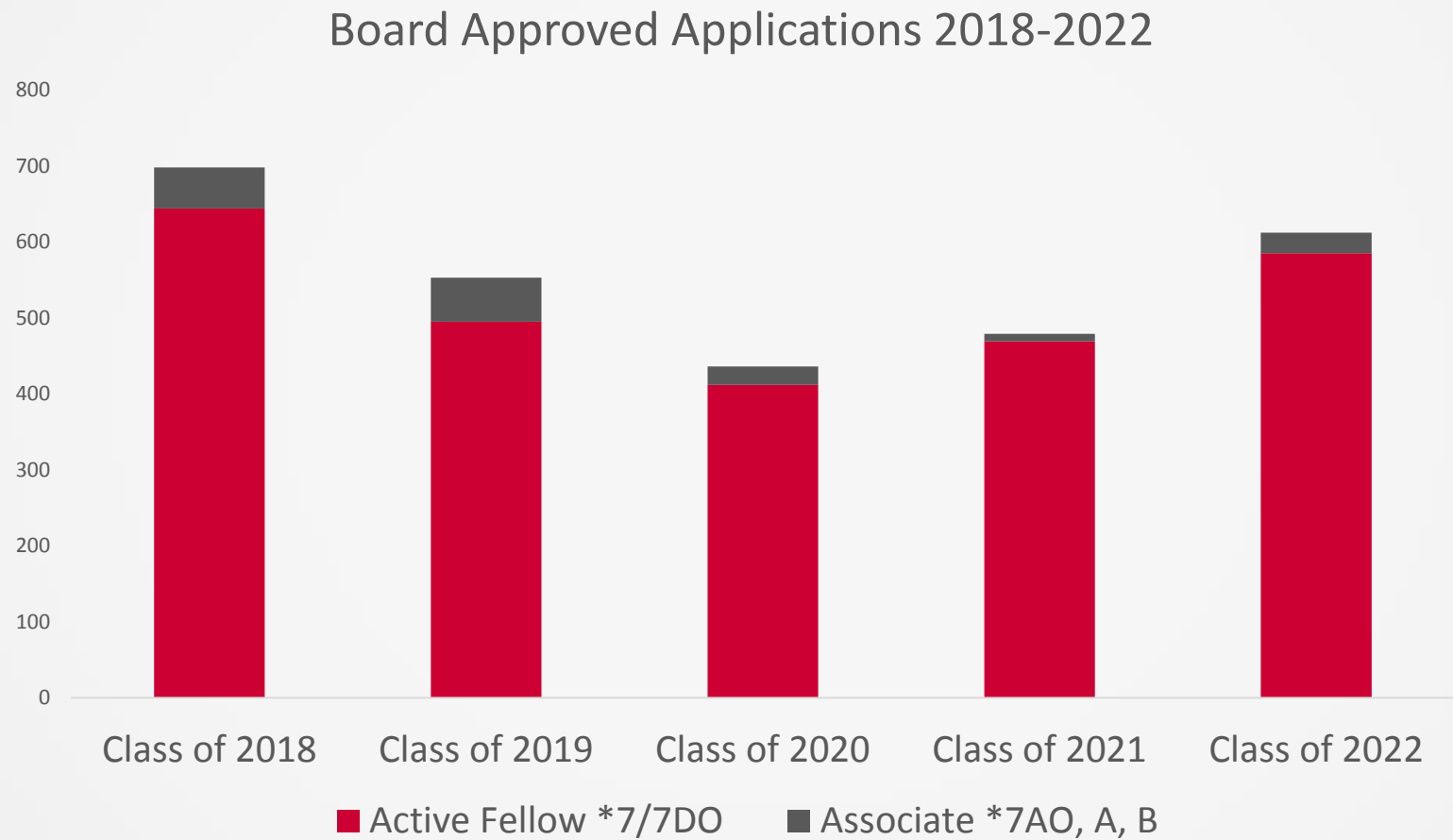
Membership at a Glance: Candidate Member Attrition at AAOS

Expired Resident & Candidate Members 2017-2020*



*Figures above are only reflective of EXPIRED Members, i.e. those that expire out at the 5 year membership category mark for Residency and Candidacy, meaning, they do not transition into the next Member category. It does not reflect drop for non-payment or voluntary cancellations.

Membership at a Glance: Active Fellow Membership at AAOS



Active Fellow Requirement: CANADA

ABOS Criteria

In order to be allowed to begin the process of becoming Board certified, a surgeon must be a graduate of an accredited four-year medical school and have successfully completed a five-year accredited orthopaedic residency program in the **United States or Canada**. The final 24 months of the training must be obtained in a single program. Part 1: Computer Based Examination, and Part II: Oral Examination. Once passed Part II exam, ABOS certified Diplomate for 10 years.

Submitted by:

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BYLAWS OF THE AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS®

(Amended May 15, 2021)

ARTICLE X - BOARD OF DIRECTORS

10.2 Number and Qualifications

Two (2) directors, designated as At-large members, who are less than forty-five (45) years of age at the time of election, shall be elected by the Fellowship and shall serve on the Board for a non-renewable term of three (3) ~~two (2)~~ years.

One (1) director, designated as an At-large member, who is age forty-five (45) years of age or older at the time of election, shall be elected by the Fellowship for a non-renewable term of three (3) ~~two (2)~~ years.

One (1) director, designated as an At-large member, with no age limitation, shall be elected by the Fellowship for a non-renewable term of three (3) ~~two (2)~~ years.

10.4 Tenure

Except in the event that a current member of the Board of Directors is elected to be an officer of the ASSOCIATION, no individual shall be elected to serve on the Board for more than six (6) consecutive years or for more than twelve (12) total years. ~~The term of office of an At large member under age forty five (45) of the Board shall not be included in this calculation.~~

Submitted by: AAOS Board of Directors

**AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS
ARTICLE X - BOARD OF DIRECTORS**

10.2 Number and Qualifications

The President, First Vice-President, Second Vice-President and Treasurer of the ASSOCIATION shall serve on the Board for their respective terms of office, except as otherwise provided by these Bylaws.

The one (1) most recent Past President shall serve on the Board.

Two (2) directors, designated as At-large members, who are less than forty-five (45) years of age at the time of election, shall be elected by the Fellowship and shall serve on the Board for a term of two (2) years with a non-renewable term of two (2) years.

One (1) director, designated as an At-large member, who is age forty-five (45) years of age or older at the time of election, shall be elected by the Fellowship for a term of two (2) years with a non-renewable term of two (2) years. One (1) director, designated as an At-large member, with no age limitation, shall be elected by the Fellowship for a term of two (2) years with a non-renewable term of two (2) years.

The Chair, Chair-Elect and Secretary of the Board of Councilors shall serve on the Board. The Chair, Chair-Elect and Secretary of the Board of Specialty Societies shall serve on the Board.

The Board of Directors shall appoint for a two-year term, renewable once for a two-year term one (1) voting member of the Board of Directors who is not an orthopaedic surgeon or a Fellow of the ASSOCIATION, based upon such criteria that the Board of Directors shall from time to time adopt.

The Chief Executive Officer shall be a non-voting *ex-officio* member of the Board.

Ex-officio members of the Board shall not attend executive sessions of the Board of Directors except by specific invitation.

Submitted by: AAOS Board of Directors

**AMERICAN ACADEMY OF ORTHOPAEDIC SURGEONS
ARTICLE VIII - BOARD OF DIRECTORS**

8.2 Number and Qualifications

The Board of Directors of the ACADEMY shall consist of those individuals elected or appointed to serve as the Board of Directors of the AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS.

Submitted by: AAOS Board of Directors

**AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS
ARTICLE X - BOARD OF DIRECTORS**

10.2 Number and Qualifications

The President, First Vice-President, Second Vice-President and Treasurer of the ASSOCIATION shall serve on the Board for their respective terms of office, except as otherwise provided by these Bylaws.

The one (1) most recent Past President shall serve on the Board.

Two (2) directors, designated as At-large members, who are less than forty-five (45) years of age at the time of election, shall be elected by the Fellowship and shall serve on the Board for a non-renewable term of two (2) years.

One (1) director, designated as an At-large member, who is age forty-five (45) years of age or older at the time of election, shall be elected by the Fellowship for a non-renewable term of two (2) years. One (1) director, designated as an At-large member, with no age limitation, shall be elected by the Fellowship for a non-renewable term of two (2) years.

The Chair, Chair-Elect and Secretary of the Board of Councilors shall serve on the Board. The Chair, Chair-Elect and Secretary of the Board of Specialty Societies shall serve on the Board.

The Board of Directors shall appoint for a two-year term, renewable ~~once~~ twice for a two-year term, one (1)-two (2) voting members of the Board of Directors who ~~is~~ are not ~~an~~ orthopaedic surgeons or a Fellows of the ASSOCIATION, based upon such criteria that the Board of Directors shall from time to time adopt.

The Chief Executive Officer shall be a non-voting *ex-officio* member of the Board.

Ex-officio members of the Board shall not attend executive sessions of the Board of Directors except by specific invitation.

Submitted by:

Basil Besh, MD, FAAOS

Lisa Cannada, MD, FAAOS

Frank Kelly, MD, FAAOS

Brian Galinat, MD, FAAOS

Robert Slater, MD, FAAOS

David Mansfield, MD, FAAOS

Michael Rauh, MD, FAAOS

William Robb, MD, FAAOS

Ramon Jimenez, MD, FAAOS

Larry Halperin, MD, FAAOS

Tony Rankin, MD, FAAOS

Matthew DiCaprio, MD, FAAOS

Dwight Burney, MD, FAAOS

Mary O'Connor, MD, FAAOS

Douglas Lundy, MD, FAAOS

Richard Barry, MD, FAAOS

Edward Toriello, MD, FAAOS

Thomas Barber, MD, FAAOS

Paul Collins, MD, FAAOS

Laura Tosi, MD, FAAOS

Ronald Navarro, MD, FAAOS

John Kelley, MD, FAAOS

Jeff Kennedy, MD, FAAOS

Richard Kyle, MD, FAAOS

BYLAWS OF THE AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS®

(Amended May 15, 2021)

ARTICLE X - BOARD OF DIRECTORS**10.2 Number and Qualifications**

The President, First Vice-President, Second Vice-President and Treasurer of the ASSOCIATION shall serve on the Board for their respective terms of office, except as otherwise provided by these Bylaws.

The one (1) most recent Past President shall serve on the Board.

Two (2) directors, designated as At-large members, who are less than forty-five (45) years of age at the time of election, shall be elected by the Fellowship and shall serve on the Board for a non-renewable term of two (2) years.

One (1) director, designated as an At-large member, who is age forty-five (45) years of age or older at the time of election, shall be elected by the Fellowship for a non-renewable term of two (2) years.

One (1) director, designated as an At-large member, with no age limitation, shall be elected by the Fellowship for a non-renewable term of two (2) years.

The Chair, Chair-Elect and Secretary of the Board of Councilors shall serve on the Board. The Chair, Chair-Elect and Secretary of the Board of Specialty Societies shall serve on the Board.

The Board of Directors shall appoint for a two-year term, renewable once, one (1) voting member of the Board of Directors who is not an orthopaedic surgeon or a Fellow of the ASSOCIATION, based upon such criteria that the Board of Directors shall from time to time adopt.

Council and Cabinet Chairs shall be non-voting ex-officio members of the Board.

The Chief Executive Officer shall be a non-voting ex-officio member of the Board.

Ex-officio members of the Board shall not attend executive sessions of the Board of Directors except by specific invitation.

Submitted by: AAOS Board of Directors

**AMERICAN ACADEMY OF ORTHOPAEDIC SURGEONS®
PROPOSED BYLAWS AMENDMENTS
ARTICLE VIII – REMOVE CEO AS EX OFFICIO BOARD MEMBER**

ARTICLE VIII - BOARD OF DIRECTORS

8.3 Chief Executive Officer

The Board shall be authorized to employ a Chief Executive Officer who shall serve as the chief executive official of the ACADEMY. The Chief Executive Officer shall possess such authority and be subject to whatever limitations the Board may impose. The Chief Executive Officer shall be delegated authority to act for and on behalf of the ACADEMY. The Chief Executive Officer may delegate to any other employee such responsibilities as he or she shall deem appropriate. ~~The Chief Executive Officer shall be a non-voting ex-officio member of the ACADEMY Board of Directors.~~

**AMERICAN ASSOCIATION OF ORTHOPAEDIC SURGEONS®
PROPOSED BYLAWS AMENDMENTS
ARTICLE X – REMOVE CEO AS EX OFFICIO BOARD MEMBER**

ARTICLE X – BOARD OF DIRECTORS

10.3 Chief Executive Officer

The Board shall be authorized to employ a Chief Executive Officer who shall serve as the chief executive official of the ASSOCIATION. The Chief Executive Officer shall possess such authority and be subject to whatever limitations the Board may impose. The Chief Executive Officer shall be delegated authority to act for and on behalf of the ASSOCIATION. The Chief Executive Officer may delegate to any other employee such responsibilities as he or she shall deem appropriate. ~~The Chief Executive Officer shall be a non-voting ex-officio member of the ASSOCIATION Board of Directors.~~

Symposium I: Prior Authorization

Prior authorization continues to get more pervasive with the private insurers. Engage in discussion to learn how meaningful improvements through advocacy and regulatory relief can be utilized.

Moderators: Wayne A. Johnson MD, FAAOS and Claudette M. Lajam, MD, FAAOS

Facilitators: Douglas W. Lundy, MD, MBA, FAAOS and Robert H. Quinn, MD, FAAOS

Presenters: Adam Bruggeman, MD, FAAOS; Mikael Moore, MBA; Mike Proffitt, PhD; David D. Teuscher, MD, FAAOS; Adrian Thomas, MD, FAAOS

Symposium I: Presenter Biographies



Adam Bruggeman, MD, FAAOS

Adam Bruggeman is a spine surgeon in San Antonio, Texas. He is former president of the Texas Orthopaedic Association and is actively involved in the political process Austin and Washington, DC. He currently serves on the TEXPAC advisory board, Texas Orthopaedic Association Legislative Committee, North American Spine Society Legislative Committee, ARC committee for the Board Of Councilors, as well as advisory groups for multiple members of congress.



Mikael Moore, MBA

Mikael Moore is the Chief of Reimbursement at TSAOG Orthopaedics where she is responsible for the revenue cycle function, including scheduling, prior-authorizations, billing, credentialing and financial counseling for over 100 providers and their two out-patient surgery centers. On a mission to modernize the business of healthcare, she is focused on radical transparency and creating a self-service approach to patient access.

Mikael is known for her change management, strategic process improvement, and professional leadership. Her 15 years in

healthcare allows her to innovate and transform business practices, while revolutionizing the patient experience.

She holds a Master's Degree in Business from Texas A&M University and currently lives in San Antonio, Texas.



Mike Proffitt, PhD

Dr. Mike Proffitt is the Chief Scientist at TSOAG Orthopaedics and Spine, where he manages clinical research, coordinates graduate medical education and surgical skills training, and provides methodological and analytical support to physician-initiated research.

Prior to joining TSAOG, Dr. Proffitt was a Data Scientist at TAV Health (now Signify Health) and served as staff scientist in the Department of Genetics at the Texas Biomedical Research Institute, where his research focused on bioinformatics method development.

Dr. Proffitt received his undergraduate degree from Southern Methodist University in Dallas, where he was a Hunt Leadership Scholar and member of the SMU Men's swimming team. He received his Ph.D. from The University of Texas at Austin. On his days away from the office, Mike enjoys spending time at the family ranch in Luckenbach.



David D. Teuscher, MD, FAAOS

David is a Texas Orthopaedic Surgeon with clinical specialty interest in sport medicine. He now has a variety of personal and professional interests three decades in private practice and 13 years in the US Army Medical Corps, and service as your 83rd president of the American Academy of Orthopaedic Surgeons.

He has held and continues to serve in leadership positions in the AAOS and the Board of Councilors and Board of Directors, American Orthopaedic Society for Sports Medicine, American Orthopaedic Foot and Ankle Society, American Medical Association, Texas Medical Association, and Texas Orthopaedic Association. His current academic appointment is University of Texas at Austin Dell Medical

School, and has previously included Baylor University, University of Oklahoma and the University of Texas Medical Branch at Galveston.

Over the past four decades David has been deeply involved in public policy debates in Washington, Austin, as well as numerous other state capitals. The issues involved a virtual carousel of advocacy including prior authorization, tort/medical liability reform, higher education, healthcare financing reform, expert witness testimony, property taxes, workers compensation, juvenile justice, end of life care, public school construction, disaster preparedness and response, and protection from unsafe scope of practice expansions by non-physician providers.

He was awarded a Bachelor's degree at the University of Illinois at Urbana-Champaign, and his M.D. at the University of Texas Medical School at San Antonio, and completed the Orthopaedic residency at The Brooke Army Medical Center at Ft. Sam Houston Texas, including his Chief Resident deployment to SW Asia for Operations Desert Shield and Desert Storm. A Diplomate of the American Board of Orthopaedic Surgeons he is now processing his third MOC recertification. A four time gubernatorial appointee and confirmed by the Texas Senate, he has served the state of Texas on the Texas Tax Reform Commission, the Texas Inaugural Committee, the Texas Youth Commission, and the Texas Higher Education Coordinating Board. He also served on the Board of Directors of the State Bar of Texas by appointment of the Supreme Court of Texas, confirmed by the Texas Senate. A White House appointee, he was the US Department of Health and Human Services Regional Director (Region VI) for five states, 68 tribal nations, over 2/3 of the southern US international border, and disaster response including Hurricane Harvey.



Adrian Thomas, MD, FAAOS

Dr. Thomas is a Board Certified Orthopaedic Spine Surgeon and a partner at New Hampshire NeuroSpine Institute in Bedford, NH. He has been in practice since 2010. He completed his undergraduate degree in Molecular Biophysics and Biochemistry from Yale University. He attended medical school at Stanford University School of Medicine. He completed his orthopaedic surgery residency at Hospital for Special Surgery in New York City and an adult spine fellowship at New England Baptist Hospital in Boston. Dr. Thomas is an active member of the American Academy of Orthopaedic Surgeons and North American Spine Society.

Dr Thomas sits on the Boards of New Hampshire Healthy Families (a Centene company), the Yale Club of New Hampshire, and he is the Chair of the Board of the Granite State Children's Alliance. He is the Medical Director for the Minimally Invasive Surgery Center of New England, the only all spine and pain ambulatory surgery center in New England. Dr. Thomas is also an advisor for several health-related tech start-ups, including Osso VR. In the Utilization Management (UM) space, Dr. Thomas served as a physician reviewer for Magellan Health on their spine team from 2016-2020. He left Magellan and became an Associate Medical Director for Cohere Health, a technology start-up delegated in several states to perform musculoskeletal prior authorization with their automated digital platform.

Dr Thomas has 14, 12, and 10 year old daughters...so not much scares him.

Symposium II: Physician Wellness

Physician burnout is on the rise, and physician wellness is increasingly thrust on the orthopaedic surgeon. Best practices to build a foundation of support in the work place will be presented.

Moderators: Alexandra E. Page, MD, FAAOS and Alfonso Mejia, MD, FAAOS

Facilitator: Elizabeth G. Matzkin, MD, FAAOS

Presenters: James R. Ficke, MD, FAAOS; Jeffrey Smith, MD, FAAOS, FACS, CPC; Jennifer M. Weiss, MD, FAAOS

Symposium II: Presenter Biographies



James R. Ficke, MD, FAAOS

Dr. James R. Ficke is the Robert A. Robinson Professor and Chair of the Department of Orthopaedic Surgery at the Johns Hopkins Medical Institution. He has an active surgical practice in the Johns Hopkins Hospital. He currently also serves as a member of the Committee on Trauma and Chair of the Disaster Committee, American College of Surgeons.

Dr. Ficke completed his BS degree in Engineering at West Point; M.D., at Uniformed Services University; and residency in orthopaedic surgery at Tripler Army Medical Center in Honolulu. He completed an AO fellowship in trauma in Munich, Germany, and foot and ankle in Dallas, Texas.

Retired after 30 years of service in the United States Army, his last military assignment was Chair of the Department of Orthopaedics and Rehabilitation at San Antonio Military Medical Center at Fort Sam Houston, Texas. He also served the U.S. Army Surgeon General as the senior advisor for Orthopaedic Surgery and extremity injuries for seven years. While on Active Duty, he deployed to Iraq as senior orthopaedic surgeon-in-country, and Deputy Commander for the 228th Combat Support Hospital. He also served as the Chief of Staff for the Surgeon General's Dismounted Complex Blast Injury Task Force, and the Army Lead for the DoD/VA Extremity Trauma and Amputee Center of Excellence Development Group. He served as Chair or Co-Chair of the Steering Committee for the DoD Peer Reviewed Orthopaedic Research Program for eight years. He currently holds research grants with DoD and NIH and his primary research focus areas are clinical outcomes in post-traumatic ankle arthritis, National Trauma Systems Development, Resident Research Training (T32), and Disaster Response Improvement.

He has received the Society of Military Orthopaedic Surgeons' COL Brian Allgood Memorial Leadership Award as well as the Surgeon General's Major General Lewis Aspey Mologne Award for excellence in military academics, education, and clinical care. He is a Legionnaire in the Infantry Order of St. Michael, and a Distinguished Member of the Army Medical Regiment. In 2018, he

received the Johns Hopkins Award for Advancement of Women in Science and Medicine, and the Boy Scouts of America Leaders in Healthcare Award. Since March 2020, as a partnership between Maryland State Department of Health, University of Maryland Medical System and Johns Hopkins Health System, he organized and has directed the Baltimore Convention Center Field Hospital as part of the Unified Maryland COVID19 response. This organization has provided care for over 1400 inpatients; over 2400 antibody infusions to treat persons with COVID; over 100,000 tests and over 110,000 vaccinations, and is the longest continually operating such Alternate Care Sites in the United States.



Jeffrey Smith, MD, FAAOS, FACS, CPC

Dr. Jeffrey M. Smith is a practicing Orthopaedic Traumatologist, Director of the San Diego Orthopaedic Trauma Fellowship, and a surgeon coach. Through his personal experience and studies, he has developed his own methodology for performance improvement - The 8 PRACTICEs of Highly Successful Surgeons, techniques that address resilience training, professional development, leadership training, surgeon wellness, and burnout prevention.



Jennifer M. Weiss, MD, FAAOS

Jennifer Weiss, MD, is a Cum Laude graduate of Williams College. She went to medical school at Mt. Sinai School of Medicine, and completed her orthopedic training at Baylor College of Medicine in Houston, Texas. Her pediatric orthopedic fellowship was with Children's Hospital Los Angeles/ University of Southern California, where she stayed for 7 years as director of the Pediatric Sports Medicine Program. She has served on the board of directors for the Pediatric Orthopedic Society of North America, the Ruth Jackson Orthopaedic Society, and the American Academy of Orthopaedic Surgeons. She is now with the Southern California Permanente Medical Group practicing pediatric orthopedics and sports medicine. She is a founding member of SpeakUpOrtho.

Symposium III: Big Medicine

Meeting participants will be educated on Big Medicine and the impact the consolidation in healthcare will have on orthopaedic surgeons.

Moderators: Alexandra E. Page, MD, FAAOS and Armando F. Vidal, MD, FAAOS

Facilitators: Douglas W. Lundy, MD, MBA, FAAOS and Daniel B. Murrey, MD, FAAOS

Presenters: Leesa Galatz, MD, FAAOS; Rich Gilbert, MD, MBA; Douglas W. Lundy, MD, MBA, FAAOS; Daniel B. Murrey, MD, FAAOS; Ronald Navarro, MD, FAAOS

Symposium III: Presenter Biographies



Leesa Galatz, MD, FAAOS

Dr. Galatz is the Mount Sinai Professor and Chair of the Leni and Peter May Department of Orthopedic Surgery at the Icahn School of Medicine and the Mount Sinai Hospital System in New York. She specializes in Shoulder and Elbow Surgery, with an interest in shoulder instability, rotator cuff disease, and shoulder arthroplasty. Her primary research interest throughout her career has been the basic science of rotator cuff disease and tendon healing as it pertains to cuff repair. She has been a Co-Primary Investigator on two major projects funded by the National Institute of Health which focus on rotator cuff degeneration and repair, and tissue engineering strategies for tendon repair. Her research is

complemented with clinical projects with her colleagues on Shoulder and Elbow service and with the Department of Population Health and Epidemiology at Mount Sinai. She has served as a faculty member in numerous courses on a national and international level, lecturing on a variety of clinical topics pertaining to Shoulder and Elbow pathology. She was the recipient of the Neer award for Basic Science Research at the American Shoulder and Elbow Surgeons Open Meeting in 2009. She received the 2014 Kappa Delta Ann Doner Award along with her colleagues for research on the natural history of rotator cuff disease. In 2007, she was a European Shoulder and Elbow Traveling Fellow, sponsored by American Shoulder and Elbow Surgeons. She was an American British Canadian Traveling Fellow in 2009. She served as a Member at Large on the Board of the American Academy of Orthopedic Surgery and as a Delegate on the Board of American Orthopedic Association. She was also Member at Large on the Board of the American Shoulder and Elbow Surgeons.

Dr. Galatz is the first Chair of Orthopedics for Mount Sinai as a Health System. She has integrated physicians from the member hospitals, and in doing so has focused on consolidating services, initiating a total joint registry, and launching a clinical quality program, as well as growing the

Orthopedic Surgical Service. The Department has strong and productive relationships with the Dept. of Population Health and its Orthopedic Research Laboratory, resulting in high quality, impactful research.



Rich Gilbert, MD, MBA

Dr. Rich Gilbert, CEO of Orthopedic Care Partners (OCP), brings over 25 years of healthcare executive leadership and management experience, developing and operationalizing strategic growth imperatives, scaling value-add services and engaging physicians to align with the transformative healthcare environment of consumerism and value-based care.

OCP, one of the largest private equity backed orthopedic platforms in the U.S., is the holding company for The Orthopaedic Institute, Florida, The Steadman Clinic, Colorado, St Louis based Motion Orthopedics, Tucson Orthopedic Institute and other affiliated practices. As CEO, Dr. Gilbert is responsible for leading the organization's strong growth performance, integrating and scaling a robust platform of value-add services and fostering an environment conducive to physician alignment, optimal clinician performance, outstanding clinical outcomes and patient satisfaction.

Before this, Rich served as President of the MDLive Medical Group, one of the nation's largest telehealth companies recently acquired by CIGNA.

Prior to MDLive, Rich served as Chief Medical Officer (Eastern Division), Mednax, Inc. (NYSE:MD), a publicly traded healthcare company, and along with the Executive Team, had responsibility for a \$1.6 billion P&L, M&A initiatives and thousands of healthcare specialists.

Before joining Mednax, Rich served as CEO of 3 Charlotte-based companies: Southeast Anesthesiology Consultants (SAC), Southeast Pain Care (founder) and Quantum[®], LLC (founder), a healthcare IT startup. During Dr. Gilbert's 18-year leadership, SAC grew from one hospital and pain center to 29 hospitals, ASCs and pain centers in three states. The enterprise, acquired by MEDNAX in 2010, was Mednax's largest anesthesiology acquisition. Quantum[®], was later designated a CMS certified quality clinical data registry (QCDR) used to report quality outcomes for almost 1 million patients annually.

Rich currently serves on the private equity backed Boards of OCP and Emergence Health. He also serves on the HealthCare Alumni Advisory Board, Duke University Fuqua Business School and has served on non-profit boards including United Way of the Central Carolinas, Carolinas Partnership, Carolinas Healthcare System Board of Commissioners, and Levine Children's Hospital Dare to Dream Steering Committee.

Dr. Gilbert received his MBA from Duke University and completed his anesthesiology residency and fellowships at Harvard Medical School, Beth Israel Hospital, where he served as Chief Resident. Dr.

Gilbert received his medical degree from the University of California, San Francisco Medical School and membership in the Alpha Omega Alpha Honor Society.

Rich is a workout enthusiast, marathoner and loves skiing. Together, he and his wife Donna have two successful adult children, Zach and Jake, and two beautiful Akitas, Sake and Luna.



Douglas W. Lundy, MD, MBA, FAAOS

Doug Lundy is an orthopaedic trauma surgeon at Resurgens Orthopaedics in Marietta, Georgia specializing in the care of patients with multiple injuries and complex fractures. He is past co-President of Resurgens Orthopaedics; one of the largest orthopaedic practices in the country. He practices at WellStar Kennestone Hospital where he is Chair of the WellStar Musculoskeletal Service Line and past-Chief of Surgery. He is actively involved in many national and state surgical and orthopaedic societies. He is a Director of the American Board of Orthopaedic Surgery since 2012, past-Chair of the Oral Examination Committee and currently serves as past-President

of the ABOS. He is the Treasurer of the Political Action Committee of the American Association of Orthopaedic Surgeons (AAOS), and previously a member of the AAOS Council on Advocacy, Communications Cabinet and as past-chairman of the AAOS Medical Liability Committee. He is the Chief Financial Officer for the Orthopaedic Trauma Association (OTA). He previously served on the OTA Board of Directors as a Member-at Large leading the effort of the OTA to produce Performance Measures with the AAOS, and as chair of the OTA Health Policy Committee. He currently represents the OTA on the Board of Specialty Societies (BOS). He served on the American Orthopaedic Association (AOA) Critical Issues Committee and is currently Vice-Chair of the AOA Leadership Fellowship Committee. He served on the American College of Surgeon's Orthopaedic Advisory Committee and the ACS Committee on Trauma. He is a past-President of the Georgia Orthopaedic Society and formerly served as Legislative Director. He also served as a part-time Clinical Assistant Professor of Orthopaedic Surgery, Emory University School of Medicine.

He graduated from North Georgia College and the Medical College of Georgia, and did his post-graduate training at Georgia Baptist and Vanderbilt University Medical Center. He received his Masters of Business Administration from Auburn University in 2014. He is very involved in foreign medical missions in Eastern Europe, Haiti, Asia and especially sub-Saharan Africa through the Christian Medical and Dental Association and the Pan-African Academy of Christian Surgeons. He is an Overseas Fellow of the College of Surgery of East, Central and Southern Africa, and he participates in their oral examinations. He has authored over eighty manuscripts on orthopaedic surgery and has presented topics on orthopaedic trauma over 150 times both in the United States and abroad.

He is an alumnus of the 2010 class of Leadership Atlanta, and the 2017 class of Leadership Cobb. He was selected as one of the "Top Doctors in Atlanta" by Atlanta Magazine in 2011 to 2020. Doug is very interested in political advocacy to improve the care of injured patients. He has remained active

in the Sigma Chi Fraternity at a national level where in 2011 he was given the lifetime achievement award of Significant Sig, and he assists the undergraduate chapters at Emory and North Georgia College. He also serves as a guide with the Sigma Chi Horizons Program and facilitator in the Krach Transformational Leadership Workshop. Doug, his wife Peggy, and their two sons reside in Mableton, Georgia.



Daniel B. Murrey, MD, FAAOS

Dan Murrey is Chief Medical Officer of Surgical Care Affiliates and President of Optum Specialty Practices which partners with specialty physician groups seeking to advance in value-based care. An Orthopedic Spine Surgeon, he is an educator, researcher, author, and business innovator, and was previously a co-founder and CEO of OrthoCarolina, one of the largest orthopedic practices in the country. As a community leader, Dan served as Mecklenburg County Commissioner At-Large and was Executive Director of Charlotte in 2012, the local host committee for the 2012 Democratic National

Convention. He currently chairs the boards of the Seventh Street Public Market and the Piedmont Culinary Guild.



Ronald Navarro, MD, FAAOS

Ronald Navarro, M.D. is the Director for Clinical Affairs at the Kaiser Permanente School of Medicine, where he aids the medical students, with many partners, in the clinical integration of their studies into the Southern California Permanente Medical Group (SCPMG) practice via longitudinal integrated clerkships. He is separately also the southern California Regional Orthopaedic Chief with responsibility for orthopaedic clinical care in all SCAL KP, in collaboration with 13 different Medical Center Ortho Chiefs since 2013. He is also now Inter-regional chief of Ortho for all the Regions of KP. He joined KP as an Orthopaedic Shoulder & Sports Medicine specialist in 1997 after a fellowship in shoulder surgery, arthroscopy, and sports medicine at University of Pittsburgh. Dr. Navarro is a proud Fellow

of the American Academy of Orthopaedic Surgeons (AAOS) and is currently a member of the AAOS Shoulder and Elbow Registry Steering Committee, the AAOS Central Instructional Course Committee, the AAOS Leadership Institute Mentoring group, and is a Member at Large for the AAOS Now Editorial Board. He is a well published author in shoulder and knee surgery and is an Active Member of the prestigious American Shoulder and Elbow Surgeons (ASES). He is also proudly a member of the AOA and TCOA, with board certification and maintenance from the ABOS (and is an examiner for the ABOS). He was honored to be appointed Member at Large of the Board of Directors of the AAOS from 2017 to 2019. He was the President of the California Orthopaedic Association (COA) for the 2019-2020 year as the Covid-19 pandemic unfolded. Within KP, he was the Regional Assistant Medical Director in the Business Management Line for Retail Strategy in

SCPMG where he worked to help oversee the Target Clinics operated by Kaiser Permanente (KP) as well as many other duties from 2019-2021. He was also Assistant Area Medical Director overseeing all Surgical Services at his home Medical Center in South Bay for 10 years, after having been Chief of the Department of Orthopaedics at the same Kaiser Permanente South Bay Medical Center, for 8.5 years.

Symposium IV: The Future of Healthcare: Perspectives from our Thought Leaders

A bipartisan group of Senior Leaders will provide insight into the future of healthcare.

- How we are!
- Where are we going?
- What we need to fix!
- What did we learn from COVID-19

Moderators: Kevin D. Plancher, MD, MPH, FAAOS and Claudette M. Lajam, MD, FAAOS

Facilitator: Douglas W. Lundy, MD, MBA, FAAOS

Presenters: Howard Forman, MD, MBA; Senator Chris Murphy (D); Senator Bill Cassidy, MD (R)

Symposium IV: Presenter Biographies

Howard Forman, MD, MBA

Professor Forman is a Professor of Diagnostic Radiology (and faculty director for Finance), Public Health (Health Policy), Economics and Management. Professor Forman directs the Health Care management program in the Yale School of Public Health and teaches healthcare economics in the Yale College Economics Department. He is the faculty founder and director of the MD/MBA program as well as the faculty director of the healthcare focus area in the School of Management's MBA for Executives program. As a practicing emergency/trauma radiologist, he is actively involved in patient care and issues related to financial administration, healthcare compliance, and contracting. His research has been focused on improving imaging services delivery through better access to information. He has worked as a health policy fellow in the U.S. Senate, on Medicare legislation. In the past 2 years, he has been an outspoken public figure documenting the COVID pandemic and strategies to mitigate it. He has been widely quoted in most national print media and a frequent guest on national & local video and radio/audio programming.

Senator Chris Murphy (D)

Chris Murphy is a United States Senator from Connecticut. He serves on the Foreign Relations Committee, the Health, Education, Labor and Pensions Committee, and the Appropriations Committee. Prior to the Senate, Murphy served for three terms in the U.S. House representing the state's fifth congressional district. In Congress, Murphy is acknowledged as a leading voice for stronger anti-gun violence measures, a smarter foreign policy, and reform of our nation's mental health system.

Before being elected to Congress, Murphy served for eight years in the Connecticut state legislature. Murphy graduated with honors from Williams College in Massachusetts, and received his law degree

from the University of Connecticut School of Law. He is married to Catherine Holahan, an attorney, and they have two sons, Owen and Rider.



Senator Bill Cassidy, MD (R)

Dr. Bill Cassidy is the United States Senator for Louisiana.

Bill grew up in Baton Rouge, Louisiana, and attended Louisiana State University (LSU) for undergraduate and medical school. In 1990, Bill joined LSU Medical School teaching medical students and residents at Earl K. Long Hospital, a hospital for the uninsured.

During this time, he co-founded the Greater Baton Rouge Community Clinic, a clinic providing free dental and health care to the working uninsured. Bill also created a private-public partnership to vaccinate 36,000 greater Baton Rouge area children against Hepatitis B at no cost to the schools or parents. In the wake of Hurricane Katrina, Bill led a group of health care volunteers to convert an abandoned K-Mart building into an emergency health care facility, providing basic health care to hurricane evacuees.

In 2006, Bill was elected to the Louisiana State Senate.

In 2008, he was elected to the United States House of Representatives to represent Louisiana's Sixth Congressional District.

In 2014, he was elected to the U.S. Senate. He serves on the Finance Committee, the Health, Education, Labor, & Pensions Committee, the Energy and Natural Resources Committee, and the Veterans Affairs committees.

Following his successful efforts to lower the cost of health care, secure coastal restoration projects to protect Louisiana families from natural disasters, reform our nation's mental health system, and secure many other legislative accomplishments, Bill was reelected in 2020 to his second term in the U.S. Senate.

Bill is married to Dr. Laura Cassidy and they have three children. Laura is a retired general surgeon specializing in breast cancer. She helped found a public charter school to teach children with dyslexia. Bill, Laura and their family attend church at the Chapel on the Campus.



AMERICAN ACADEMY OF
ORTHOPAEDIC SURGEONS

AMERICAN ASSOCIATION OF
ORTHOPAEDIC SURGEONS

Informational Items

2019-2023 Strategic Plan

MISSION STATEMENT

Serving our profession to provide the highest quality musculoskeletal care.

GOAL 1: Deliver a personalized and seamless member experience.

METRICS

1. Increase in volume of member specific data collected and analyzed on member needs and preferences
2. Increase in user satisfaction and utilization of content delivery platform
3. Increase in the proportion of content and education personalized to user needs and preferences
4. Increase in member retention and recruitment

STRATEGIC OBJECTIVES

- Use data to define individual member needs and preferences
- Invest in internal processes and capabilities to transform AAOS's platform and portfolio to deliver personalized and seamless user experiences
- Develop strategic partnerships to further enhance AAOS's offerings

VISION STATEMENT

The trusted leaders in advancing musculoskeletal health.

GOAL 2: Equip members to thrive in value-based environments and advance the quality of orthopaedic care.

METRICS

1. Increase in adoption of AAOS's quality solutions and tools by members
2. Increase in the proportion of AAOS products that deliver education and data on cost/value
3. Increase in member and institutional participation in AAOS's family of registries
4. Increase in member utilization of evidence-based and high value treatments
5. Decrease in member utilization of non evidence-based and low value treatments
6. Increase in % of professional reimbursement tied to value based care delivery

STRATEGIC OBJECTIVES

- Develop a definition of quality and effectiveness that incorporates cost
- Educate members on the opportunities of moving to value-based environments
- Expand data capture through AAOS registries and reduce the burden of data entry
- Prioritize the development and roll out of practical solutions and tools
- Integrate AAOS's advocacy and quality efforts to advance the quality of MSK health
- Collaborate with payers, regulators, purchasers, industry, and others to influence future change in MSK health care delivery and professional reimbursement

CORE VALUES

Leading to serve. Shaping our future. Excellence together.

GOAL 3: Evolve the culture and governance of AAOS's board and volunteer structure to become more strategic, innovative, and diverse.

METRICS

1. Increase in awareness and impact of new core values and associated behaviors
2. Advancement in AAOS's governance reflecting best practices
3. Identify a baseline and establish a goal for increasing diversity among AAOS's board and volunteer structure
4. Increase in amount of revenue generated from new investments in innovation

STRATEGIC OBJECTIVES

- Measure AAOS's culture and define a refreshed set of core values and behaviors
- Develop and execute a rollout plan to embed new core values and associated behaviors in AAOS's culture
- Continue evolving AAOS's governance to reflect best practices
- Train new leaders of AAOS's board and volunteer structure on strategic focus and governance best practices
- Discuss, evaluate, and establish a goal to increase diversity among the leadership of AAOS's board and volunteer structure
- Establish an innovation process in AAOS with the goal of identifying future investments in projects

KEY ENABLERS

- **Advocacy:** Advocate to advance access to and quality of MSK health care, and support providers to thrive in an evolving health care environment
- **Communication:** Communicate renewed member value stemming from new strategic plan

- **Partnerships:** Partner to develop the right content, programs, and platforms to increase member value and drive greater impact
- **Technology:** Continue modernizing AAOS's technology platforms to offer seamless experiences

2021 Combined NOLC / Fall Meeting

- **Matthew Philip Abdel, MD, FAAOS** Submitted on: 04/27/2021
AAOS: Board or committee member
Springer: Publishing royalties, financial or material support
Stryker: IP royalties
- **Duncan B Ackerman, MD, FAAOS** Submitted on: 09/08/2021
AAOS: Board or committee member
Lima: Paid consultant
- **Peter C Amadio, MD, FAAOS** Submitted on: 08/24/2021
Johnson & Johnson: Stock or stock Options
Merck: Stock or stock Options
Orthopaedic Research Society: Board or committee member
Saunders/Mosby-Elsevier: Publishing royalties, financial or material support
- **Michael T Archdeacon, MD, FAAOS** Submitted on: 07/15/2021
Journal of the American Academy of Orthopaedic Surgeons: Editorial or governing board
Ohio Orthopaedic Society: Board or committee member
Orthopaedic Trauma Association: Board or committee member
SLACK Incorporated: Publishing royalties, financial or material support
Stryker: IP royalties; Paid consultant
- **Thomas E Arend Jr** (This individual reported nothing to disclose); Submitted on: 09/08/2021
- **Michael S Aronow, MD, FAAOS** Submitted on: 04/04/2021
AAOS: Board or committee member
American Orthopaedic Foot and Ankle Society: Board or committee member
Connecticut Orthopaedic Society: Board or committee member
CreOsso, LLC: Stock or stock Options
Techniques in Foot and Ankle Surgery: Editorial or governing board
Techniques in Orthopaedics: Editorial or governing board
- **Babette M Atkins** (This individual reported nothing to disclose); Submitted on: 09/22/2021
- **James R Bailey, MD, FAAOS** Submitted on: 09/13/2021
AAOS: Board or committee member
Society of Military Orthopaedic Surgeons: Board or committee member
- **Bridget Bande, MCh (Orth) (UK), MS (Orth), FAAOS, FACS**, (This individual reported nothing to disclose); Submitted on: 06/04/2021
- **James William Barber, MD, FAAOS** Submitted on: 08/21/2021
Georgia Orthopaedic Society: Board or committee member
Georgia Society of Ambulatory Surgery Centers: Board or committee member
Medical Association of Georgia: Board or committee member
South Georgia Physicians Association: Board or committee member
- **Thomas L Bernasek, MD, FAAOS** Submitted on: 08/23/2021
Corin U.S.A.: Paid consultant; Research support
DePuy, A Johnson & Johnson Company: IP royalties; Paid consultant; Paid presenter or speaker; Research support
Florida Orthopaedic Society: Board or committee member
- **Marc Bialek** Submitted on: 08/30/2021
Rhode Island Orthopedic Society: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Michael P Bolognesi, MD, FAAOS** Submitted on: 06/01/2021
Acelity: Other financial or material support
Amedica: Stock or stock Options; Unpaid consultant
American Association of Hip and Knee Surgeons: Board or committee member
AOA Omega: Other financial or material support
Arthroplasty Today: Editorial or governing board
Biomet: Research support
DePuy, A Johnson & Johnson Company: Research support
Eastern Orthopaedic Association: Board or committee member
Exactech, Inc: Research support
Journal of Arthroplasty: Editorial or governing board
KCI: Research support
Smith & Nephew: Other financial or material support; Paid presenter or speaker
TJO: IP royalties; Paid presenter or speaker; Stock or stock Options
Zimmer: IP royalties; Paid presenter or speaker; Research support
- **Catherine Boudreaux Hayes** (This individual reported nothing to disclose); Submitted on: 09/10/2021
- **Steven R Boyea, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 09/08/2021
- **Kevin John Bozic, MD, MBA, FAAOS** Submitted on: 04/29/2021
AAOS: Board or committee member
Carrum Health: Stock or stock Options
CMS/CMMI: Paid consultant
Harvard Business School: Unpaid consultant
OM1: Other financial or material support
Purchaser Business Group on Health: Paid consultant
SLACK Incorporated: Editorial or governing board
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Alix Braun, MPH** (This individual reported nothing to disclose); Submitted on: 09/20/2021
- **Bryan D Bredthauer, MD, FAAOS** Submitted on: 09/22/2021
AAOS: Board or committee member
Nebraska Orthopaedic Hospital: Stock or stock Options
- **Gary T Brock, MD, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
Scoliosis Research Society: Board or committee member
Stryker: IP royalties
- **Fleming Griffin Brooks, MD, FAAOS** Submitted on: 09/02/2021
AAOS: Board or committee member
- **Arielle Broussard** (This individual reported nothing to disclose); Submitted on: 09/26/2021
- **Richard Franklin Bruch, MD, FAAOS** Submitted on: 09/14/2021
Chair, The OrthoForum Advocacy Committee: Board or committee member
Consultant to EmergeOrtho: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Adam J Bruggeman, MD, FAAOS** Submitted on: 08/28/2021
AAOS: Board or committee member
Medtronic: Paid consultant
NovaBone: Paid consultant
SI-BONE: Paid consultant
Stryker: Paid consultant
Texas Medical Association: Board or committee member
Texas Orthopaedic Association: Board or committee member
- **Jacob M Buchowski, MD, MS, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
American Spinal Injury Association: Board or committee member
Association of Bone and Joint Surgeons: Board or committee member
Cervical Spine Research Society: Board or committee member
FOSA: Board or committee member
Globus Medical: IP royalties
Journal of Bone and Joint Surgery - American: Publishing royalties, financial or material support
Lumbar Spine Research Society: Board or committee member
North American Spine Society: Board or committee member
Scoliosis Research Society: Board or committee member
Spine Deformity: Editorial or governing board
Stryker: IP royalties
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Charles A Bush-Joseph, MD, FAAOS** Submitted on: 08/24/2021
American Journal of Sports Medicine: Editorial or governing board
American Orthopaedic Society for Sports Medicine: Board or committee member
Cresco Lab: Stock or stock Options
- **Ellen Bushong** (This individual reported nothing to disclose); Submitted on: 09/13/2021
- **John Cherf, MD, MBA, MPH, FAAOS** Submitted on: 08/23/2021
AAOS: Board or committee member
Illinois Association of Orthopedic Surgeons: Board or committee member
Innomed: IP royalties
Johnson & Johnson: Stock or stock Options
Lumere: Employee
National Orthopedic Education Society: Board or committee member
OrthoIndex: Employee; Stock or stock Options
Orthopedic Society for Farm and Labor Medicine: Board or committee member
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Norman Barrington Chutkan, MD, FAAOS** Submitted on: 04/01/2021
AAOS: Board or committee member
American Orthopaedic Association: Board or committee member
AO Spine North America: Board or committee member
Globus Medical: IP royalties
North American Spine Society: Board or committee member
Orthopedics: Editorial or governing board
SLACK Incorporated: Editorial or governing board

2021 Combined NOLC / Fall Meeting

- **Akin Cil, MD** Submitted on: 08/23/2021
American Shoulder and Elbow Surgeons: Board or committee member
Missouri State Orthopaedic Association, Board Member: Board or committee member
Orthopedics: Editorial or governing board
Stryker: Research support
Stryker, shoulder replacement: Paid consultant
- **Kevin E Coates, MD, MBA, FAAOS** Submitted on: 09/21/2021
Arthrex, Inc: Paid consultant
Arthroscopy Association of North America: Board or committee member
- **Fraser Cobbe** (This individual reported nothing to disclose); Submitted on: 09/09/2021
- **Mark J Conklin, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 09/05/2021
- **Scott Snow Cooper, MD, FAAOS** Submitted on: 08/22/2021
Arkansas Medical Society: Board or committee member
- **Kristen Morrell Coultas** (This individual reported nothing to disclose); Submitted on: 09/09/2021
- **John Jay Crawford, MD, FAAOS** Submitted on: 08/29/2021
rockhopperZSG, LLC, a company providing software licenses to physician's offices.: Stock or stock Options
- **Brian Matthew Culp, MD, FAAOS** Submitted on: 08/07/2021
American Association of Hip and Knee Surgeons: Board or committee member
Intellijoint: Paid consultant; Stock or stock Options
Johnson & Johnson: Paid consultant
Magnifi group: Paid presenter or speaker
Medacta: Paid consultant
Surgical Care Affiliates: Paid presenter or speaker
- **Adair Cunningham** (This individual reported nothing to disclose); Submitted on: 09/09/2021
- **Snehal Chinu Dalal, MD, FAAOS** Submitted on: 06/05/2021
Biomet: Paid consultant; Unpaid consultant
Georgia Orthopaedic Society: Board or committee member
Georgia Shoulder and Elbow Society: Board or committee member
Smith & Nephew: Paid consultant; Research support; Unpaid consultant
- **Dino Damalas, MBA** (This individual reported nothing to disclose); Submitted on: 09/02/2021
- **Shreyasi Deb, PhD, MBA** (This individual reported nothing to disclose); Submitted on: 08/27/2021
- **Gregory John Della Rocca, MD, PhD, FAAOS, FACS** Submitted on: 06/04/2021
AAOS: Board or committee member
American College of Surgeons: Board or committee member
American Orthopaedic Association: Board or committee member
AOTrauma: Board or committee member
Association of Bone and Joint Surgeons: Board or committee member
Geriatric Orthopaedic Surgery and Rehabilitation: Editorial or governing board
Journal of Orthopaedic Trauma: Editorial or governing board
Mergenet: Stock or stock Options
Orthopaedic Trauma Association: Board or committee member
The Orthopaedic Implant Company: Stock or stock Options
Wright Medical Technology, Inc.: IP royalties
- **David DeMik, MD** Submitted on: 05/18/2021
Journal of Arthroplasty: Editorial or governing board

2021 Combined NOLC / Fall Meeting

- **Matthew R DiCaprio, MD, FAAOS** Submitted on: 06/14/2021
AAOS: Board or committee member
American Board of Orthopaedic Surgery, Inc.: Board or committee member
American Orthopaedic Association: Board or committee member
Musculoskeletal Tumor Society: Board or committee member
NYSSOS: Board or committee member
- **Julie A Dodds, MD, FAAOS** Submitted on: 09/09/2021
AAOS: Board or committee member
Bioventus: Paid consultant
Mitek: Paid consultant; Paid presenter or speaker
- **Thomas Kent Donaldson, MD, FAAOS** Submitted on: 08/31/2021
Zimmer: IP royalties; Paid consultant; Paid presenter or speaker
- **Thomas Charles Dowd, MD, FAAOS** Submitted on: 09/19/2021
AAOS: Board or committee member
American Orthopaedic Foot and Ankle Society: Board or committee member
Journal of Bone and Joint Surgery - American: Editorial or governing board
Society of Military Orthopaedic Surgeons: Board or committee member
- **Laura M Downes, CAE** (This individual reported nothing to disclose); Submitted on: 09/20/2021
- **Greg Dummer, CAE** Submitted on: 04/02/2021
American Orthopaedic Society for Sports Medicine: Board or committee member
- **Jacquelyn A Dunahoe, MD** (This individual reported nothing to disclose); Submitted on: 05/19/2021
- **Henry Bone Ellis Jr, MD, FAAOS** Submitted on: 08/04/2021
AAOS: Board or committee member
Pediatric Orthopaedic Society of North America: Board or committee member
Pediatric Research in Sports Medicine: Board or committee member
- **Orry Erez, MD, FAAOS** Submitted on: 07/27/2021
AAOS: Board or committee member
American Association of Hip and Knee Surgeons: Board or committee member
New York State Society of Orthopedic Surgeons: Board or committee member
Premia Spine: Stock or stock Options
- **Michael Faloon, MD, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
Centinel: Research support
New Jersey Orthopaedic Society: Board or committee member
North American Spine Society: Board or committee member
Paradigm Spine: Research support
Scoliosis Research Society: Board or committee member
Spine Deformity: Editorial or governing board
Stryker: Paid consultant; Research support
- **Kevin W Farmer, MD, FAAOS** Submitted on: 08/23/2021
American Orthopaedic Society for Sports Medicine Florida Orthopaedic Society: Board or committee member
Arthrex, Inc Exactech: Paid consultant; Paid presenter or speaker
Exactech, Inc: Paid consultant

2021 Combined NOLC / Fall Meeting

- **Lutul Dashaun Farrow, MD, FAAOS** Submitted on: 08/24/2021
American Journal of Sports Medicine: Editorial or governing board
American Orthopaedic Association: Board or committee member
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthroscopy Association of North America: Board or committee member
Orthopaedic Journal of Sports Medicine: Editorial or governing board
Video Journal of Sports Medicine: Editorial or governing board
- **Jonathan Barnett Feibel, MD, FAAOS** Submitted on: 05/13/2021
AAOS: Board or committee member
Arthrex, Inc: IP royalties; Paid consultant
State of Ohio Medical Board: Board or committee member
- **Eric I Ferkel, MD, FAAOS** Submitted on: 08/03/2021
AAOS: Board or committee member
American Orthopaedic Foot and Ankle Society: Board or committee member
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthrex, Inc: Paid consultant; Paid presenter or speaker
Arthroscopy Association of North America: Board or committee member
Ferring Pharmaceuticals: Paid consultant; Paid presenter or speaker
GlaxoSmithKline: Stock or stock Options
Mitek: Research support
Organogenesis: Stock or stock Options
Smith & Nephew: Research support
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Stuart James Fischer, MD, FAAOS** Submitted on: 09/16/2021
AAOS: Board or committee member
AAOS Now: Editorial or governing board
AAOS OrthoInfo: Editorial or governing board
American Association of Hip and Knee Surgeons: Board or committee member
Bristol-Myers Squibb: Stock or stock Options
Johnson & Johnson: Stock or stock Options
Jones and Bartlett Publishers Sudbury, MA: Publishing royalties, financial or material support
Merck: Stock or stock Options
New Jersey Orthopedic Society: Board or committee member
NJ MLIPA: Board or committee member
NJOS: Board or committee member
Orthopedic Surgeons of New Jersey: Board or committee member
Pfizer: Stock or stock Options
- **Jill C Flanagan, MD, FAAOS** Submitted on: 07/31/2021
AAOS: Board or committee member
Limb Lengthening and Reconstruction Society: Board or committee member
Nuvasive: Paid consultant
Orthofix, Inc.: Paid consultant
- **Olga Foley** (This individual reported nothing to disclose); Submitted on: 04/22/2021
- **Timothy P Fowler, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 06/22/2021
- **Leesa M Galatz, MD, FAAOS** Submitted on: 09/23/2021
Journal of Bone and Joint Surgery Board of Trustees: Board or committee member
medacta: Paid presenter or speaker; Unpaid consultant
- **Rich Gilbert, MD** (This individual reported nothing to disclose); Submitted on: 09/20/2021

2021 Combined NOLC / Fall Meeting

- **John T Gill, MD, FAAOS** Submitted on: 08/24/2021
AAOS American Medical Association Texas Orthopaedic Association Texas Medical Association: Board or committee member
- **Nathan Glusenkamp** Submitted on: 09/13/2021
Genzyme: Stock or stock Options
Johnson & Johnson: Stock or stock Options
KCI: Stock or stock Options
- **F Scott Gray, MD, FAAOS** Submitted on: 08/25/2021
President Connecticut Orthopaedic Society: Board or committee member
- **Alan G Greenwald, MD, FAAOS** Submitted on: 08/23/2021
AAOS: Board or committee member
DJ Orthopaedics: Paid consultant
Washington State Orthopedic Assn: Board or committee member
- **Chad James Griffith, MD, FAAOS** Submitted on: 08/26/2021
Minnesota Orthopaedic Society: Board or committee member
- **Stuart Trent Guthrie, MD, FAAOS** Submitted on: 04/14/2021
AAOS: Board or committee member
Michigan Orthopaedic Society: Board or committee member
Mid-America Orthopaedic Association: Board or committee member
- **Daniel K. Guy, MD, FAAOS** Submitted on: 09/15/2021
Orthofix, Inc.: Employee
- **Mariam Hakim-Zargar, MD, FAAOS** Submitted on: 08/23/2021
Connecticut Orthopaedic Society - President: Board or committee member
- **Lawrence S Halperin, MD, FAAOS** Submitted on: 08/24/2021
Association of Independent Doctors: Board or committee member
Avanir Pharmaceuticals: Stock or stock Options
Florida Medical Association: Board or committee member
Florida Orthopedic Society: Board or committee member
Orange County Medical Society: Board or committee member
Pfizer: Stock or stock Options
Sanofi-Aventis: Stock or stock Options
Smith & Nephew: Stock or stock Options
- **Syed Ashfaq Hasan, MD, FAAOS** Submitted on: 06/22/2021
AAOS: Board or committee member
- **Catherine G Hawthorne, MD, FAAOS** Submitted on: 08/23/2021
Orthopaedic Rehabilitation Association: Board or committee member
- **Andrea Herzka, MD, FAAOS** Submitted on: 09/03/2021
Arthrex, Inc: Other financial or material support
Smith & Nephew: Other financial or material support
- **Carolyn Hettrich, MD, MPH, FAAOS** Submitted on: 09/16/2021
AAOS: Board or committee member
American Orthopaedic Society for Sports Medicine: Board or committee member
American Shoulder and Elbow Surgeons: Board or committee member
MIACH: Paid consultant
Ossio, Ltd: Paid consultant

2021 Combined NOLC / Fall Meeting

- **Alan S Hilibrand, MD, MBA, FAAOS** Submitted on: 04/25/2021
AAOS: Board or committee member
Biomet: IP royalties
CTL Amedica: IP royalties
Paradigm spine: Stock or stock Options
- **S Wendell Holmes Jr, MD, FAAOS** Submitted on: 08/24/2021
Arthrex, Inc: Paid consultant
- **Kelly Cornett Homlar, MD, FAAOS** Submitted on: 08/02/2021
Georgia Orthopaedic Society: Board or committee member
Musculoskeletal Transplant Foundation: Board or committee member
Musculoskeletal Tumor Society: Board or committee member
- **Michael Patrick Horan, MD, MS, FAAOS** (This individual reported nothing to disclose); Submitted on: 08/24/2021
- **Charles D Hummer III, MD, FAAOS** Submitted on: 04/01/2021
AAOS: Board or committee member
PA Orthopaedic Society Board of Directors: Board or committee member
Sanofi-Aventis: Paid consultant
- **Cassim M Igram, MD, FAAOS** Submitted on: 05/20/2021
AAOS: Board or committee member
Clinical Neurology and Neurosurgery: Editorial or governing board
Iowa Orthopedic Society Board Member: Board or committee member
- **John Victor Ingari, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 05/08/2021
- **Kimi Jalali** (This individual reported nothing to disclose); Submitted on: 08/19/2021
- **Thomas E James** (This individual reported nothing to disclose); Submitted on: 09/23/2021
- **Wayne Anthony Johnson, MD, FAAOS, FACS** Submitted on: 06/09/2021
AAOS: Board or committee member
- **Christopher Jordan, MD, FAAOS** Submitted on: 09/20/2021
orthopaedic society of oklahoma: Board or committee member
- **Philip A G Karpos, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 08/30/2021
- **Karina M Katchko, MD** (This individual reported nothing to disclose); Submitted on: 09/17/2021
- **E Jeff Kennedy, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 07/11/2021
- **Joshua Kerr** (This individual reported nothing to disclose); Submitted on: 08/23/2021
- **Brandy Keys, MPH** (This individual reported nothing to disclose); Submitted on: 09/20/2021
- **Elsbeth R E Kinnucan, MD, FAAOS** Submitted on: 05/17/2021
California Orthopaedic Association: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Brian A Klatt, MD, FAAOS** Submitted on: 08/31/2021
AAOS: Board or committee member
AAOSAAHKS Abstract Review Committee: Board or committee member
American Association of Hip and Knee Surgeons: Board or committee member
Biomet: Other financial or material support
Clinical Orthopaedics and Related Research: Editorial or governing board
DePuy, A Johnson & Johnson Company: Other financial or material support
Journal of Arthroplasty: Editorial or governing board
Journal of the American Academy of Orthopaedic Surgeons: Editorial or governing board
MSIS: Board or committee member
SLACK Incorporated: Publishing royalties, financial or material support
Smith & Nephew: Other financial or material support
Stryker: Other financial or material support
Zimmer: Other financial or material support
- **Benjamin T Knight, MD** (This individual reported nothing to disclose); Submitted on: 09/19/2021
- **Lindsay Knox, BA** (This individual reported nothing to disclose); Submitted on: 08/24/2021
- **Barry S Kraushaar, MD, FAAOS** Submitted on: 08/24/2021
Biomet: Paid consultant
- **Madeline Kroll** Submitted on: 08/26/2021
Medtronic: Stock or stock Options
- **Chad A Krueger, MD, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
American Association of Hip and Knee Surgeons: Board or committee member
Journal of Arthroplasty: Editorial or governing board
Smith & Nephew: Paid consultant
- **Stanley J Kupiszewski, MD, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
Florida Orthopedic Society: Board of Directors: Board or committee member
- **Bradley Randall Kuzel, MD, FAAOS** Submitted on: 09/10/2021
Minnesota Orthopaedic Society: Board or committee member
- **Claudette Malvina Lajam, MD, FAAOS** Submitted on: 09/20/2021
AAOS: Board or committee member
Clinical Orthopaedics and Related Research: Editorial or governing board
FundamentalVR: Unpaid consultant
HJD Bulletin: Editorial or governing board
Journal of Arthroplasty: Editorial or governing board
Pfizer: Employee
- **Francois D Lalonde, MD, FAAOS** Submitted on: 08/22/2021
California Orthopaedic Association: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Jeffrey M LaPorte, MD, FAAOS** Submitted on: 08/24/2021
Abbott: Stock or stock Options
Eli Lilly: Stock or stock Options
GlaxoSmithKline: Stock or stock Options
Johnson & Johnson: Stock or stock Options
Medtronic: Stock or stock Options
Merck: Stock or stock Options
Montana Orthopaedic Society: Board or committee member
Pfizer: Stock or stock Options
Roche: Stock or stock Options
- **Brian C Law, MD, FAAOS** Submitted on: 06/27/2021
AAOS: Board or committee member
Abbott: Stock or stock Options
American Orthopaedic Foot and Ankle Society: Board or committee member
Amgen Co: Stock or stock Options
DJ Orthopaedics: Paid presenter or speaker
Eli Lilly: Stock or stock Options
Johnson & Johnson: Stock or stock Options
Journal of Surgical Education: Editorial or governing board
Medtronic: Stock or stock Options
Merck: Stock or stock Options
Stryker: Paid presenter or speaker
Wisconsin Orthopaedic Society: Board or committee member
Zimmer: Research support
- **Michael J Leddy III, MD, FAAOS** Submitted on: 09/11/2021
AAOS: Board or committee member
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthrex, Inc: Paid consultant; Paid presenter or speaker
Louisiana Athletic Trainer's Association: Board or committee member
Louisiana Orthopaedic Association: Board or committee member
- **Daniel E Lehman, MD, FAAOS** Submitted on: 08/25/2021
American Orthopaedic Foot and Ankle Society: Board or committee member
Bristol-Myers Squibb: Stock or stock Options
Indiana Orthopedic Society: Board or committee member
Johnson & Johnson: Stock or stock Options
Merck: Stock or stock Options
OMEGA: Stock or stock Options
Pfizer: Stock or stock Options
Procter & Gamble: Stock or stock Options
Zimmer: Stock or stock Options
- **Elaine M Leighton, MPH, CAE** (This individual reported nothing to disclose); Submitted on: 06/15/2021
- **Kathleen A Leinweber, MD** (This individual reported nothing to disclose); Submitted on: 09/04/2021
- **Denise Lemke** (This individual reported nothing to disclose); Submitted on: 09/08/2021
- **Marc J Levine, MD, FAAOS** Submitted on: 09/25/2021
Eastern Orthopaedic Association-President: Board or committee member
Heron: Paid consultant
Medical Society of New Jersey-Immediate Past President: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Valerae O Lewis, MD, FAAOS** Submitted on: 09/08/2021
AAOS: Board or committee member
International Society of Limb Salvage: Board or committee member
Orthopedics Today: Editorial or governing board
Sarcoma: Editorial or governing board
- **Christopher P Lindsay, MD** (This individual reported nothing to disclose); Submitted on: 08/30/2021
- **Neal D Lintecum, MD, FAAOS** Submitted on: 08/27/2021
AAOS: Board or committee member
American Society for Surgery of the Hand: Board or committee member
Kansas Orthopedic Society: Board or committee member
- **Rosemary Lobeck** (This individual reported nothing to disclose); Submitted on: 08/21/2021
- **Douglas W Lundy, MD, MBA, FAAOS** Submitted on: 05/08/2021
AAOS: Board or committee member
AAOS Now: Editorial or governing board
Clinical Orthopaedics and Related Research: Editorial or governing board
Journal of Orthopaedic Trauma: Editorial or governing board
Journal of the Southern Medical Association: Editorial or governing board
MAG Mutual: Other financial or material support
Orthopedics: Editorial or governing board
- **Kevin MacDonald, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 08/27/2021
- **Andrew Patrick Mahoney, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 09/16/2021
- **Donna J Malert, CAE** (This individual reported nothing to disclose); Submitted on: 08/19/2021
- **Patrick Gaetano Marinello, MD** Submitted on: 06/24/2021
AAOS: Board or committee member
American Society for Surgery of the Hand: Board or committee member
- **Pablo Marrero, MD, FAAOS** Submitted on: 08/21/2021
Board of Counselors: Board or committee member
- **Yasseline Martinez, MS, CAE** Submitted on: 09/20/2021
tbd: Board or committee member
- **Lisa N Masters** (This individual reported nothing to disclose); Submitted on: 09/20/2021
- **Richard C Mather III, MD, MBA, FAAOS** Submitted on: 07/08/2021
Arthroscopy Association of North America: Board or committee member
International Society of Hip Arthroscopy: Board or committee member
North Carolina Orthopaedic Association: Board or committee member
Regeneration Technologies, Inc.: Paid consultant
Stryker: IP royalties; Paid consultant
- **Elizabeth G Matzkin, MD, FAAOS** Submitted on: 08/22/2021
Arthrex, Inc: Paid presenter or speaker
Arthroscopy: Editorial or governing board
Conformis: Stock or stock Options
DePuy, A Johnson & Johnson Company: Paid consultant; Research support

2021 Combined NOLC / Fall Meeting

- **Joel L Mayerson, MD, FAAOS** Submitted on: 08/27/2021
AAOS: Board or committee member
American Journal of Orthopedics: Editorial or governing board
GlaxoSmithKline: Paid consultant
Journal of Surgical Oncology: Editorial or governing board
Musculoskeletal Tumor Society: Board or committee member
National Comprehensive Cancer Network: Board or committee member
Ohio Orthopedic Society: Board or committee member
ONKOS Surgical: IP royalties; Paid consultant
- **Leland C McCluskey, MD, FAAOS** Submitted on: 08/29/2021
Georgia Orthopedic Society: Board or committee member
- **Stephen M McCollam, MD, FAAOS** Submitted on: 08/26/2021
American Society for Surgery of the Hand: Board or committee member
Journal of Hand Surgery - American: Editorial or governing board
- **Jeffrey McLaughlin, MD, FAAOS** Submitted on: 08/24/2021
Biomet: IP royalties; Paid consultant; Paid presenter or speaker; Research support
Mid America Orthopedic Society Program committee: Board or committee member
- **Carolyn Meinerz, MD** (This individual reported nothing to disclose); Submitted on: 09/19/2021
- **Alfonso Mejia, MD, MPH, FAAOS** Submitted on: 08/27/2021
AALOS: Board or committee member
AAOS: Board or committee member
Acumed, LLC: Research support
Arthrex, Inc: Research support
IAOS: Board or committee member
Smith & Nephew: Research support
Synthes: Research support
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Terri Mendez** (This individual reported nothing to disclose); Submitted on: 04/06/2021
- **Sidney Premer Migliori, MD, FAAOS** Submitted on: 08/24/2021
Past President RIOS: Board or committee member
RIOS BOC Representative: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Hassan Riaz Mir, MD, MBA, FAAOS, FACS** Submitted on: 09/04/2021
AAOS BOS Representative from OTA: Board or committee member
Abyrx: Stock or stock Options
ACS Committee on Trauma: Board or committee member
AO Trauma North America: Research support
Flow Fx: Stock or stock Options
FOT Board of Directors: Board or committee member
JAAOS Consultant Reviewer: Editorial or governing board
JBJS Consultant Reviewer: Editorial or governing board
Journal of Orthopaedic Trauma Associate Editor: Editorial or governing board
OrthoGrid: Stock or stock Options
OTA BOD: Board or committee member
OTA CFO: Board or committee member
OTA International Digital Editor: Editorial or governing board
Smith & Nephew: Paid consultant; Research support
Stabiliz Orthopaedics: Stock or stock Options
Trice Medical: Stock or stock Options
Zimmer: Paid consultant
- **Amir R Moinfar, MD, FAAOS** Submitted on: 08/23/2021
AAOS: Board or committee member
Maryland Orthopaedic Association: Board or committee member
Mitek Sports Medicine: Paid consultant; Paid presenter or speaker
- **Daniel K Moon, MD, MBA, MS, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
American Orthopaedic Foot and Ankle Society: Board or committee member
Colorado Orthopaedic Society: Board or committee member
- **Randall C Morgan Jr, MD, FAAOS** Submitted on: 08/22/2021
Journal of Racial and Ethnic Health Disparities: Editorial or governing board
Zimmer: Paid consultant
- **Michael P Mott, MD, FAAOS** Submitted on: 08/24/2021
Musculoskeletal Transplant Foundation: Paid consultant
Musculoskeletal Tumor Society: Board or committee member
- **Daniel Beasley Murrey, MD, FAAOS** Submitted on: 08/25/2021
AAOS: Board or committee member
BioMedFlex: Stock or stock Options
OrthoMedFlex: Stock or stock Options
Sintx: Stock or stock Options
Surgical Care Affiliates and OptumCare: Employee
United Health Group: Stock or stock Options
- **Thomas S Muzzonigro, MD, FAAOS** Submitted on: 04/03/2021
AAOS: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Ronald Anthony Navarro, MD, FAAOS** Submitted on: 04/01/2021
AAOS: Board or committee member
American Board of Orthopaedic Surgery, Inc.: Board or committee member
American Shoulder and Elbow Surgeons: Board or committee member
ASESF: Board or committee member
California Orthopaedic Association: Board or committee member
International Orthopaedic Diversity Alliance: Board or committee member
International Society of Arthroplasty Registries: Board or committee member
Journal of Orthopaedic Experience & Innovation: Editorial or governing board
Orthopedics Today: Editorial or governing board
- **Liz Neary** (This individual reported nothing to disclose); Submitted on: 05/25/2021
- **Sarah Nelson, MD** (This individual reported nothing to disclose); Submitted on: 09/02/2021
- **Graham Newson, MA** (This individual reported nothing to disclose); Submitted on: 08/23/2021
- **Jason Nippa** (This individual reported nothing to disclose); Submitted on: 08/23/2021
- **Elizabeth McAllister Nolan, MD, FAAOS** Submitted on: 08/21/2021
American Orthopaedic Association: Board or committee member
American Shoulder and Elbow Surgeons: Board or committee member
Journal of Bone and Joint Surgery - American: Editorial or governing board
Journal of Shoulder and Elbow Surgery: Editorial or governing board
- **J Christopher Noonan, MD, FAAOS** Submitted on: 09/07/2021
MicroC: Stock or stock Options
Oregon ASSOCIATION OF oRTHOPAEDIC sURGEONS: Board or committee member
- **David Jason Oberste, MD, FAAOS** Submitted on: 09/16/2021
AAOS: Board or committee member
Arthrex, Inc: Paid presenter or speaker
Exactech, Inc: Research support
Florida Orthopedic Society: Board or committee member
- **Jake Oeding** (This individual reported nothing to disclose); Submitted on: 09/02/2021
- **Michael P O'Malley, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 09/06/2021
- **Craig M Ono, MD, FAAOS, FACS** (This individual reported nothing to disclose); Submitted on: 09/22/2021
- **Robert M Orfaly, MD, MBA, FAAOS, FRCSC** Submitted on: 08/23/2021
AAOS: Board or committee member
Oregon Association of Orthopaedic Surgeons: Board or committee member
Oregon Medical Association: Board or committee member
- **Alexandra Elizabeth Page, MD, FAAOS** Submitted on: 04/01/2021
AAOS: Board or committee member
Intersocietal Accreditation Commission: Board or committee member
- **Vinod Kumar Panchbhavi, MD, FAAOS, FACS** Submitted on: 09/08/2021
AAOS: Board or committee member
American Orthopaedic Foot and Ankle Society: Board or committee member
Foot and Ankle InternationalTechniques in Foot & Ankle SurgeryOrthopedia.com: Editorial or governing board
Stryker: Paid presenter or speaker
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support

2021 Combined NOLC / Fall Meeting

- **Michael Lloyd Parks, MD, FAAOS** Submitted on: 06/01/2021
Orthopaedic Research and Education Foundation: Board or committee member
Orthopedic Learning Center (OLC): Board or committee member
Zimmer: Paid consultant
- **Erin Renee Pichiotino, MD, MPH** (This individual reported nothing to disclose); Submitted on: 07/21/2021
- **Kevin D Plancher, MD, MPH, FAAOS** Submitted on: 04/09/2021
AAOS: Board or committee member
Arthroscopy: Editorial or governing board
Clinical Orthopaedics and Related Research: Editorial or governing board
Episurf: IP royalties
Geislitch: IP royalties
Operative Techniques in Sports Medicine: Editorial or governing board
Techniques in Orthopaedics: Editorial or governing board
- **Paul J Pongor, MD, FAAOS** Submitted on: 04/02/2021
Massachusetts Orthopaedic Association: Board or committee member
- **Joshua Port, MD, FAAOS** Submitted on: 04/25/2021
AAOS: Board or committee member
Arthrex, Inc: Paid consultant; Research support
Mid Atlantic Shoulder and Elbow Society: Board or committee member
Pennsylvania Orthopedic Society: Board or committee member
- **Elisha T Powell, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 08/22/2021
- **Charles Preston, MD, FAAOS** Submitted on: 09/09/2021
AAOS: Board or committee member
Stryker: Paid consultant; Stock or stock Options
- **Anthony Priore** (This individual reported nothing to disclose); Submitted on: 08/24/2021
- **Mike Proffitt, PhD** (This individual reported nothing to disclose); Submitted on: 09/16/2021
- **Matthew G Prohaska, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 08/21/2021
- **Bonhomme Joseph Prud'homme, MD, FAAOS** Submitted on: 09/10/2021
AAOS: Board or committee member
Arthrex, Inc: Research support
West Virginia Medical Political Action Committee , Chairman: Board or committee member
West Virginia Orthopaedic Society Exec. Committee: Board or committee member
- **David A Pula, MD, FAAOS** Submitted on: 04/01/2021
AAOS: Board or committee member
- **Michael B Purnell, MD, FAAOS** Submitted on: 09/02/2021
Arthrex, Inc: IP royalties; Paid presenter or speaker
California Orthopaedic Association: Board or committee member
Shoulder Innovations: Unpaid consultant
- **Robert H Quinn, MD, FAAOS** Submitted on: 07/02/2021
AAOS: Board or committee member
- **Anna Quintanilla** (This individual reported nothing to disclose); Submitted on: 08/24/2021

2021 Combined NOLC / Fall Meeting

- **Abdi Raissi, MD, FAAOS** Submitted on: 08/22/2021
Nevada Orthopedic Society: Board or committee member
Treace Medical: Paid consultant; Paid presenter or speaker; Research support
- **Adam J Rana, MD, FAAOS** Submitted on: 05/18/2021
Smith & Nephew: Paid consultant
- **Afshin Razi, MD, FAAOS** Submitted on: 07/30/2021
AAOS: Board or committee member
American Orthopaedic Association: Board or committee member
Clinical Orthopaedic Society: Board or committee member
New York State Orthopaedic Society: Board or committee member
- **Mark S Rekant, MD, FAAOS** Submitted on: 04/01/2021
AAOS: Board or committee member
Acumed, LLC: Paid presenter or speaker
American Association for Hand Surgery: Board or committee member
American Society for Surgery of the Hand: Board or committee member
Axogen: Paid presenter or speaker; Stock or stock Options
Exsomed: Paid presenter or speaker
Integra Life Science: Paid presenter or speaker
Trimed: Unpaid consultant
- **Lauren Pearson Riley** (This individual reported nothing to disclose); Submitted on: 09/13/2021
- **William L Ritchie, MD, MBA, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
New Mexico Medical Society Executive Board: Board or committee member
New Mexico Orthopedic Association New Mexico Worker's Compensation Medical Advisory Board
The Doctors Company New Mexico Medical Advisory Board: Board or committee member
- **Ricardo J Rodriguez, MD, FAAOS** Submitted on: 05/28/2021
AAOS: Board or committee member
Louisiana Orthopaedic Association: Board or committee member
SIGHT Medical: Stock or stock Options
Smith & Nephew: IP royalties
- **Mark J Romness, MD, FAAOS** Submitted on: 08/22/2021
AAOS: Board or committee member
Orthofix, Inc.: Paid consultant
Virginia Orthopaedic Society: Board or committee member
- **Paul T Rubery Jr, MD, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
American Orthopaedic Association: Board or committee member
Amgen Co: Stock or stock Options
Johnson & Johnson: Stock or stock Options
Medtronic: Stock or stock Options
Merck: Stock or stock Options
Scoliosis Research Society: Board or committee member
Spine: Editorial or governing board
- **Catie Russell, JD** (This individual reported nothing to disclose); Submitted on: 07/08/2021
- **Andrew Wilson Ryan, MD, FAAOS** Submitted on: 06/04/2021
Johnson & Johnson: Stock or stock Options

2021 Combined NOLC / Fall Meeting

- **Vani Janaki Sabesan, MD, FAAOS** Submitted on: 08/27/2021
Florida Orthopaedic Society: Board or committee member
ISTA: Board or committee member
Journal of Shoulder and Elbow Surgery: Editorial or governing board
Lifenet: Research support
Orthofix, Inc.: Research support
Wright Medical Technology, Inc.: Research support
Zimmer: Paid consultant
- **Julie B Samora, MD, PhD, MPH, FAAOS** Submitted on: 07/14/2021
AAOS: Board or committee member
American Orthopaedic Association: Board or committee member
American Society for Surgery of the Hand: Board or committee member
Globus Medical: Paid consultant
Pediatric Orthopaedic Society of North America: Board or committee member
Pediatric Quality and Safety: Editorial or governing board
Ruth Jackson Orthopaedic Society: Board or committee member
Springer: Publishing royalties, financial or material support
- **C Craig Satterlee, MD, FAAOS** Submitted on: 05/03/2021
AAOS: Board or committee member
- **Felix H Savoie III, MD, FAAOS** Submitted on: 09/14/2021
Biomet: Unpaid consultant
CONMED Linvatec: IP royalties; Unpaid consultant
Exactech, Inc: IP royalties; Unpaid consultant
Mitek: Unpaid consultant
Smith & Nephew: Unpaid consultant
Zimmer: IP royalties
- **Kathryn Schabel, MD, FAAOS, FAOrthA** Submitted on: 08/27/2021
Zimmer: Research support
- **Theodore F Schlegel, MD, FAAOS** Submitted on: 08/24/2021
AAOS: Board or committee member
American Shoulder and Elbow Surgeons: Board or committee member
Avenu: Stock or stock Options
CU Healthcare Innovation Fund: Stock or stock Options
kaleo: Stock or stock Options
NASH: Stock or stock Options
PrivIT: Stock or stock Options
- **Matthew R Schmitz, MD, FAAOS** Submitted on: 04/01/2021
AAOS: Board or committee member
American Academy of Pediatrics - Section on Orthopaedics: Board or committee member
American Orthopaedic Association: Board or committee member
Elsevier: Publishing royalties, financial or material support
HitCheck: Stock or stock Options
JBJS Miller Review Course: Paid presenter or speaker
Journal of Bone and Joint Surgery - American: Editorial or governing board
Pediatric Orthopaedic Society of North America: Board or committee member
Pediatric Research in Sports Medicine: Board or committee member
Society of Military Orthopaedic Surgeons: Board or committee member
USA Rugby Player Welfare Committee: Board or committee member

2021 Combined NOLC / Fall Meeting

- **Anthony James Scillia, MD, FAAOS** Submitted on: 08/21/2021
AAOS: Board or committee member
American Orthopaedic Society for Sports Medicine: Board or committee member
Biomet: Stock or stock Options
CONMED Linvatec: Stock or stock Options
ISO-biologics: Research support
Johnson & Johnson: Stock or stock Options
Mitek: Paid consultant
New Jersey orthopaedic society: Board or committee member
Pfizer: Stock or stock Options
Smith & Nephew: Stock or stock Options
Stryker: Stock or stock Options
- **Kaitlyn Sevarino, MBA** (This individual reported nothing to disclose); Submitted on: 09/13/2021
- **Tracy Sferra, MS** (This individual reported nothing to disclose); Submitted on: 07/20/2021
- **Alan Skipper** (This individual reported nothing to disclose); Submitted on: 09/20/2021
- **Jeffrey Mark Smith, MD, CPC, FAAOS, FACS** Submitted on: 04/01/2021
Orthopaedic Trauma Association: Board or committee member
Patient Safety in Surgery / associate editor: Editorial or governing board
San Diego County Medical Society: Board or committee member
- **Jeffery J Soldatis, MD, FAAOS** Submitted on: 09/03/2021
AAOS: Board or committee member
Indiana Orthopedic Society: Board or committee member
- **Suzette J Song, MD, FAAOS** Submitted on: 08/22/2021
PA Orthopaedic Society: Board or committee member
York County Medical Society: Board or committee member
- **Brittany Starr** Submitted on: 08/27/2021
Pfizer: Stock or stock Options
- **Scott P Steinmann, MD, FAAOS** Submitted on: 04/08/2021
Acumed, LLC: Paid consultant
American Shoulder and Elbow Surgeons: Board or committee member
American Society for Surgery of the Hand: Board or committee member
Arthrex, Inc: IP royalties; Paid consultant
Arthroscopy Association of North America: Board or committee member
Biomet: IP royalties; Paid consultant
Journal of Hand Surgery - American: Editorial or governing board
Journal of Shoulder and Elbow Surgery: Editorial or governing board
Orthopedics Today: Editorial or governing board
Sonex: Paid consultant
Stryker: Paid consultant
- **Joseph J Stuart, MD, FAAOS** Submitted on: 09/03/2021
AAOS: Board or committee member
Society of Military Orthopaedic Surgeons: Board or committee member
- **Karen R Syzdek** (This individual reported nothing to disclose); Submitted on: 04/14/2021
- **Liana J Tedesco, MD** (This individual reported nothing to disclose); Submitted on: 09/01/2021

2021 Combined NOLC / Fall Meeting

- **TIZRA Videoapp Testing, PhD, PA** Submitted on: 09/16/2021
Acumed, LLC: IP royalties
APOS Medical & Sports Technologies Ltd.: Paid consultant
Ceraver Osteal: Paid presenter or speaker
Hologic: Paid consultant
Ortho Biotech: Paid presenter or speaker
Zimmer: Employee
- **David Dean Teuscher, MD, FAAOS** Submitted on: 09/18/2021
AAOS: Board or committee member
AMA: Board or committee member
- **Laura Lowe Tosi, MD, FAAOS** Submitted on: 09/17/2021
American Bone Health: Board or committee member
American Orthopaedic Association: Board or committee member
Osteogenesis Imperfecta Foundation: Board or committee member
Ultragenyx: Research support
US Bone & Joint Initiative: Board or committee member
- **Peter F Townsend, MD, FAAOS, FACS** Submitted on: 04/03/2021
AAOS: Board or committee member
Micropore: Stock or stock Options
President, Delaware Society of Orthopaedic Surgeons: Board or committee member
- **Anna Salt Troise, MBA** (This individual reported nothing to disclose); Submitted on: 09/16/2021
- **Lindsey Urband, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 08/22/2021
- **Paul J Urbanek, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 09/18/2021
- **Armando Felipe Vidal, MD, FAAOS** Submitted on: 08/29/2021
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthrex, Inc: Paid consultant; Paid presenter or speaker; Research support
Smith & Nephew: Paid presenter or speaker
Vericel: Paid presenter or speaker
Video Journal of Sports Medicine: Editorial or governing board
- **Jennifer M Weiss, MD, FAAOS** Submitted on: 09/02/2021
Speak Up Ortho: Board or committee member
- **Daniel W White, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 09/02/2021
- **Claude Somers Williams, MD, FAAOS** Submitted on: 09/15/2021
Louisiana Orthopaedic Association - Board of Directors: Board or committee member
- **Jessica A Woodcock, MD, FAAOS** (This individual reported nothing to disclose); Submitted on: 09/13/2021
- **Shane Kelby Woolf, MD, FAAOS** Submitted on: 07/14/2021
Charleston County Medical Society: Board or committee member
Exactech, Inc - clinical evaluator (shoulder system): Unpaid consultant
Kinetisense: Stock or stock Options
Musculoskeletal Transplant Foundation: Other financial or material support
South Carolina Orthopaedic Association: Board or committee member
- **Adolph J Yates Jr, MD, FAAOS** Submitted on: 08/23/2021
AAOS: Board or committee member
American Association of Hip and Knee Surgeons: Board or committee member
Journal of Arthroplasty: Editorial or governing board

2021 Combined NOLC / Fall Meeting

- **Melissa Young, JD** (This individual reported nothing to disclose); Submitted on: 09/08/2021
- **Michael Zarski** Submitted on: 08/21/2021
American Association of Hip and Knee Surgeons: Board or committee member
- **Anthony H Zou, MD** (This individual reported nothing to disclose); Submitted on: 09/12/2021

AAOS CODE OF ETHICS FOR GOVERNANCE AND MANAGEMENT

The American Academy of Orthopaedic Surgeons and the American Association of Orthopaedic Surgeons (collectively “AAOS”) expects all of its volunteers and its employees to act in accordance with the highest standards of personal and professional integrity in all aspects of their activities; to comply with all applicable laws, rules, and regulations; to deter wrongdoing; and to abide by all duly adopted AAOS policies and procedures. This AAOS Code of Ethics applies to members of the Board of Directors, Council or Cabinet Chairs, Advisory Board Chairs, Committee Chairs, the Executive Management Team, and the Senior Management Team.

This AAOS Code of Ethics is intended to supplement the AAOS Standards of Professionalism and *Code of Medical Ethics and Professionalism for Orthopaedic Surgeons* (for orthopaedic volunteers) and the most recent edition of the *AAOS Personnel Policy Manual* (for AAOS employees).

Those to whom this AAOS Code of Ethics applies agree to:

- Engage in and promote honest and ethical conduct, including the ethical handling of actual and potential conflicts of interest between personal and professional relationships;
- Recognize conflicts of interest and disclose to the Board of Directors, Council/Cabinet, or Executive Management Team (as appropriate for your position) and to the Committee on Outside Interests any material transactions or relationships that reasonably could be expected to give rise to such conflicts;
- Respect the confidentiality of information acquired in the course of your duties;
- Provide colleagues with information that is accurate, complete, objective, relevant, timely and understandable;
- Comply with applicable laws, rules and regulations of federal, state and local governments;
- Act in good faith, with due care, competence, and diligence, without misrepresenting material facts or allowing independent judgment to be subordinated;
- Assure the responsible use of and control of all assets, resources, and information in the possession of the AAOS and related organizations; and
- Promptly refer any questions about or any alleged violations of this Code of Ethics to the President of the AAOS.

The AAOS Board of Directors shall have the discretionary authority to approve any deviation or waiver from this AAOS Code of Ethics and shall determine what action, if any, is appropriate for any real or alleged violation.

Adopted: June 2004

Revised: December 2014

**CME CREDIT FOR
2021 AAOS COMBINED NOLC/FALL MEETING**

The American Academy of Orthopaedic Surgeons is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians. The American Academy of Orthopaedic Surgeons designates this live activity for a maximum of 7 **AMA PRA Category 1 Credits™**. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Disclosure Information for 2021 AAOS Combined NOLC/Fall Meeting Planning Group:

Daniel K. Guy, MD, FAAOS (President): Submitted on: 09/15/2021
Orthofix, Inc.: Employee

Wayne Anthony Johnson, MD, FAAOS, FACS (Chair Board of Councilors): Submitted on: 06/09/2021
AAOS: Board or committee member

Claudette Malvina Lajam, MD, FAAOS (Chair-Elect Board of Councilors): Submitted on: 09/20/2021
AAOS: Board or committee member
Clinical Orthopaedics and Related Research: Editorial or governing board
FundamentalVR: Unpaid consultant
HJD Bulletin: Editorial or governing board
Journal of Arthroplasty: Editorial or governing board
Pfizer: Employee

Alfonso Mejia, MD, MPH, FAAOS (Secretary Board of Councilors): Submitted on: 08/27/2021
AAOS: Board or committee member
AAOS: Board or committee member
Acumed, LLC: Research support
Arthrex, Inc: Research support
IAOS: Board or committee member
Smith & Nephew: Research support
Synthes: Research support
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support

Kevin D Plancher, MD, MPH, FAAOS (Chair Board of Specialty Societies): Submitted on: 04/09/2021
AAOS: Board or committee member
Arthroscopy: Editorial or governing board
Clinical Orthopaedics and Related Research: Editorial or governing board
Episurf: IP royalties
Geislitch: IP royalties
Operative Techniques in Sports Medicine: Editorial or governing board
Techniques in Orthopaedics: Editorial or governing board

Alexandra Elizabeth Page, MD, FAAOS (Chair-Elect Board of Specialty Societies): Submitted on:
04/01/2021
AAOS: Board or committee member
Intersocietal Accreditation Commission: Board or committee member

Armando Felipe Vidal, MD, FAAOS (Secretary Board of Specialty Societies): Submitted on: 08/29/2021
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthrex, Inc: Paid consultant; Paid presenter or speaker; Research support
Smith & Nephew: Paid presenter or speaker
Vericel: Paid presenter or speaker
Video Journal of Sports Medicine: Editorial or governing board

Staff:

Donna J Malert, CAE: (This individual reported nothing to disclose); Submitted on: 08/19/2021

Symposium I: Prior Authorization

September 27, 2021 - 11:15 am – 1:15 pm

Moderators:

Wayne Anthony Johnson, MD, FAAOS, FACS (Chair Board of Councilors): Submitted on: 06/09/2021
AAOS: Board or committee member

Claudette Malvina Lajam, MD, FAAOS (Chair-Elect Board of Councilors): Submitted on: 09/20/2021
AAOS: Board or committee member
Clinical Orthopaedics and Related Research: Editorial or governing board
FundamentalVR: Unpaid consultant
HJD Bulletin: Editorial or governing board
Journal of Arthroplasty: Editorial or governing board
Pfizer: Employee

Facilitators:

Douglas W Lundy, MD, MBA, FAAOS: Submitted on: 05/08/2021
AAOS: Board or committee member
AAOS Now: Editorial or governing board
Clinical Orthopaedics and Related Research: Editorial or governing board
Journal of Orthopaedic Trauma: Editorial or governing board
Journal of the Southern Medical Association: Editorial or governing board
MAG Mutual: Other financial or material support
Orthopedics: Editorial or governing board

Robert H Quinn, MD, FAAOS: Submitted on: 07/02/2021
AAOS: Board or committee member

Presenters:

Adam J Bruggeman, MD, FAAOS: Submitted on: 08/28/2021
AAOS: Board or committee member
Medtronic: Paid consultant
NovaBone: Paid consultant
SI-BONE: Paid consultant
Stryker: Paid consultant
Texas Medical Association: Board or committee member
Texas Orthopaedic Association: Board or committee member

Mike Proffitt, PhD: (This individual reported nothing to disclose); Submitted on: 09/16/2021

David Dean Teuscher, MD, FAAOS: Submitted on: 09/18/2021

AAOS: Board or committee member

AMA: Board or committee member

Adrian J Thomas, MD, FAAOS: (This individual reported nothing to disclose); Submitted on: 04/16/2010

Symposium II: Physician Wellness

September 27, 2021 - 2:00 pm – 3:30 pm

Moderators:

Alexandra Elizabeth Page, MD, FAAOS (Chair-Elect Board of Specialty Societies): Submitted on:

04/01/2021

AAOS: Board or committee member

Intersocietal Accreditation Commission: Board or committee member

Alfonso Mejia, MD, MPH, FAAOS (Secretary Board of Councilors): Submitted on: 08/27/2021

AAOS: Board or committee member

AAOS: Board or committee member

Acumed, LLC: Research support

Arthrex, Inc: Research support

IAOS: Board or committee member

Smith & Nephew: Research support

Synthes: Research support

Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support

Facilitator:

Elizabeth G Matzkin, MD, FAAOS: Submitted on: 08/22/2021

Arthrex, Inc: Paid presenter or speaker

Arthroscopy: Editorial or governing board

Conformis: Stock or stock Options

DePuy, A Johnson & Johnson Company: Paid consultant; Research support

Presenters:

James R Ficke, MD, FAAOS, FACS: Submitted on: 08/22/2021

AAOS: Board or committee member

American College of Surgeons: Board or committee member

Jeffrey Mark Smith, MD, CPC, FAAOS, FACS: Submitted on: 04/01/2021

Orthopaedic Trauma Association: Board or committee member

Patient Safety in Surgery / associate editor: Editorial or governing board

San Diego County Medical Society: Board or committee member

Jennifer M Weiss, MD, FAAOS: Submitted on: 09/02/2021

Speak Up Ortho: Board or committee member

Symposium III: Big Medicine

September 29, 2021 - 6:45 am – 8:45 am

Moderators:

Alexandra Elizabeth Page, MD, FAAOS (Chair-Elect Board of Specialty Societies): Submitted on:

04/01/2021

AAOS: Board or committee member

Intersocietal Accreditation Commission: Board or committee member

Armando Felipe Vidal, MD, FAAOS (Secretary Board of Specialty Societies): Submitted on: 08/29/2021

American Orthopaedic Society for Sports Medicine: Board or committee member

Arthrex, Inc: Paid consultant; Paid presenter or speaker; Research support

Smith & Nephew: Paid presenter or speaker

Vericel: Paid presenter or speaker

Video Journal of Sports Medicine: Editorial or governing board

Facilitators:

Douglas W Lundy, MD, MBA, FAAOS: Submitted on: 05/08/2021

AAOS: Board or committee member

AAOS Now: Editorial or governing board

Clinical Orthopaedics and Related Research: Editorial or governing board

Journal of Orthopaedic Trauma: Editorial or governing board

Journal of the Southern Medical Association: Editorial or governing board

MAG Mutual: Other financial or material support

Orthopedics: Editorial or governing board

Daniel Beasley Murrey, MD, FAAOS: Submitted on: 08/25/2021

AAOS: Board or committee member

BioMedFlex: Stock or stock Options

OrthoMedFlex: Stock or stock Options

Sintx: Stock or stock Options

Surgical Care Affiliates and OptumCare: Employee

United Health Group: Stock or stock Options

Presenters:

Leesa M Galatz, MD, FAAOS: Submitted on: 09/23/2021

Journal of Bone and Joint Surgery Board of Trustees: Board or committee member

medacta: Paid presenter or speaker; Unpaid consultant

Rich Gilbert, MD: (This individual reported nothing to disclose); Submitted on: 09/20/2021

Douglas W Lundy, MD, MBA, FAAOS: Submitted on: 05/08/2021

AAOS: Board or committee member

AAOS Now: Editorial or governing board

Clinical Orthopaedics and Related Research: Editorial or governing board

Journal of Orthopaedic Trauma: Editorial or governing board

Journal of the Southern Medical Association: Editorial or governing board

MAG Mutual: Other financial or material support

Orthopedics: Editorial or governing board

Daniel Beasley Murrey, MD, FAAOS: Submitted on: 08/25/2021

AAOS: Board or committee member

BioMedFlex: Stock or stock Options

OrthoMedFlex: Stock or stock Options

Sintx: Stock or stock Options

Surgical Care Affiliates and OptumCare: Employee

United Health Group: Stock or stock Options

Ronald Anthony Navarro, MD, FAAOS: Submitted on: 04/01/2021

AAOS: Board or committee member

American Board of Orthopaedic Surgery, Inc.: Board or committee member

American Shoulder and Elbow Surgeons: Board or committee member

ASESF: Board or committee member

California Orthopaedic Association: Board or committee member

International Orthopaedic Diversity Alliance: Board or committee member

International Society of Arthroplasty Registries: Board or committee member

Journal of Orthopaedic Experience & Innovation: Editorial or governing board

Orthopedics Today: Editorial or governing board

Symposium IV: The Future of Healthcare: Perspectives from our Thought Leaders

September 29, 2021 - 8:55 am – 10:30 am

Moderators:

Kevin D Plancher, MD, MPH, FAAOS (Chair Board of Specialty Societies): Submitted on: 04/09/2021

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Clinical Orthopaedics and Related Research: Editorial or governing board

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Travel Policy for Combined National Orthopaedic Leadership Conference (NOLC) / Fall Meeting

Version Number: 0.2

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Revision Log

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April 19, 2019	Donna Malert	NOLC Travel Policy updated for 2019	0.1
August 11, 2021	Yasseline Martinez	Combined NOLC/Fall Meeting Travel Policy updated for 2021	0.2

1 Introduction

This document outlines the AAOS travel policy for volunteers and staff to the 2021 Combined NOLC/Fall Meeting. (Travel guidelines for members of the Board of Directors and the Council \ Chairs are outlined in a separate policy.)

The AAOS recognizes that volunteers give generously of their time and spend time away from their practices to participate in AAOS events. When this dedication is added to the fact that more than 3,000 trips are made by AAOS volunteers in the course of a year, it becomes paramount that the AAOS travel policy be fair, consistent, and easily understandable. In addition, it must provide for prompt and accurate reimbursement of expenses incurred. Finally, it must fulfill certain obligations required by the Internal Revenue Service (IRS) and also adhere to principles of prudent management.

2 Air Travel

Travelers are strongly encouraged to use CorpTrav, AAOS' official travel agent, to make their travel arrangements for AAOS business. In doing so, the airfare and agent fees are charged directly to the AAOS, though travelers retain any reward miles that may apply. Round-trip travel should be booked on one airline whenever possible (the same airline going and returning). If a ticket exceeds \$600, CorpTrav will contact the AAOS Travel Specialist to determine authorization of the requested ticket.

Discounted, non-refundable and non-transferable coach class tickets for scheduled meetings should be purchased at least 21 days prior to travel, as this generally will yield the lowest fare available. Non-refundable does not mean that the ticket can't be changed. If a non-refundable ticket is cancelled, CorpTrav will receive credit for the cost of the ticket, to be applied to future travel for the same individual on the same airline.

The fee to book the ticket is \$12 if the ticket is purchased online and \$32 if acquired over the phone – i.e., agent-assisted booking. There is an additional \$15 charge for agent-assisted booking if done between 7:00 pm-7:00 am.

The AAOS will reimburse for checked bags up to a two bag maximum. Overweight baggage fees will not be reimbursed. Flight changes will be reimbursed up to \$200 per round trip. Use of a private airplane is strongly discouraged due to liability issues as the AAOS' insurance will neither cover the volunteer traveling aboard a private airplane on AAOS business nor will the AAOS.

3 Flight Upgrades

Upgrade purchases are not reimbursable, including upgrades to Economy Plus.

4 International Flights

Volunteers traveling on behalf of the AAOS can travel Business Class on all international trips. (For purposes of this policy, flights to/from Canada, Hawaii and Alaska are considered domestic.)

5 E-Tickets Vs. Paper Tickets

Please avoid requesting paper tickets when making travel arrangements. The airlines have created interlining agreements (to facilitate flight changes that occur because of aircraft delays or weather problems) that have diminished the usefulness of paper tickets. In addition to the \$50 fee for issuing paper tickets, there also is a charge to send the ticket via express mail services. If a ticket is lost, there is an additional fee to replace it. If the ticket is unused, it must be returned to CorpTrav, who will charge a fee to refund the unused ticket.

6 Automobile Travel

The AAOS will reimburse individuals traveling to/from the Combined NOLC/Fall Meeting via personal automobile at the published IRS rate per mile (\$0.56 per mile effective 01/01/2021). If a personal vehicle is used in lieu of airline travel, mileage reimbursement may not exceed the cost of the commercial 21-day discounted Coach airfare. Automobile rental for travel in conjunction with the Combined NOLC/Fall Meeting is prohibited. Hotel shuttle vans and taxis are the preferred mode of ground travel.

7 Train

Train fares may not exceed the cost of a commercial 21-day discounted coach airfare. Only coach train fares are reimbursed.

Upgrade purchases are not reimbursable.

8 Travel Insurance

Travel insurance is not reimbursable.

9 Hotel/Lodging

Lodging accommodations should be made at the host hotel, the JW Marriott Hotel in Washington, DC. Hotel rooms within the JW Marriott Hotel, during the meeting's dates, will be charged directly to the AAOS. Secure lodging prior to the release of the AAOS Room Block on September 10, 2021 (subject to availability) to avoid registration at another hotel. Stays at other area hotels will be reimbursed at the JW Marriott Hotel contract rate of \$335 per night, or the traveler's hotel, whichever rate is less expensive. Transportation costs between the host hotel and area hotels are not reimbursable.

10 Meals and Beverages

AAOS will reimburse individuals for meals, beverages, and snacks in conjunction with official AAOS business at a rate of up to \$75 per day during the Combined NOLC/Fall Meeting dates. The AAOS does not reimburse for meals/beverages taken in lieu of AAOS-provided or sponsored meals, or for meals/beverages after travel has concluded (i.e., after return flight). If covering expenses for another NOLC/Fall Meeting attendee, you must write the attendee name(s) on the receipt. Spouse/guest expenses are not reimbursable.

11 Other Travel Expenses

AAOS will reimburse individuals for usual and customary miscellaneous expenses related to travel in conjunction with AAOS business. Allowable expenses in this category include:

- Wi-Fi usage on flights
- Internet usage based on hotel's access charge and reasonable cost (See Exhibit A)
- Hotel in-room movie or use of hotel fitness center
- Customary gratuities for baggage handling, etc.
- Ground transportation to and from airports
- Valet laundry service up to \$50 when travel covers seven consecutive days.

The AAOS master account at the JW Marriott Hotel only will cover room and tax. Any incidental expenses are to be paid by the traveler and claimed on the expense voucher, if appropriate.

Personal expenses are not reimbursable. Examples include, but are not limited to, child care, pet care, entertainment, and toiletry purchases.

12 Special Rules Regarding Travel

Add-on personal travel

Add-on or personal travel is defined as travel either before or after the NOLC/Fall Meeting that is scheduled at the sole discretion of the traveler. All expenses incurred with add-on travel are the responsibility of the traveler.

Expense reporting/receipts

Receipts are required for each travel expense item that is \$25 or more, including taxi fares; however, the traveler strongly is encouraged to obtain receipts for all expenses. As required under IRS guidelines, receipts for meals/beverages should be detailed showing individual food and/or beverage items. Hotel receipts should include detailed room folios. Expense reports (with attached receipts documenting all costs of \$25 or more) are due to the AAOS within 30 days of the completed travel date. This ensures timely reimbursement.

and accurate record keeping. Reimbursement checks typically are issued within two weeks of receipt of vouchers.

Reimbursement requests exceeding \$25 without receipts will be reimbursed at \$25.

Exhibit A

Internet access procedures when traveling

Travelers will be reimbursed for Internet use for AAOS business or AAOS-related research. Some computer systems do not support all methods of Internet connection.

Internet access

In order to be reimbursed for Internet connectivity, the traveler must utilize one of the following:

- The hotel's local Internet service provider to access the Internet at the hotel's stated per diem rate. It is the responsibility of the hotel guest to obtain this information and specifics regarding log-on and/or passwords upon check-in, or
- His/her own Internet service provider if that provider has a local access number or toll-free access for the area where the individual is traveling. *It is the responsibility of the individual to ensure that this option is a viable alternative prior to traveling.*

Most national Internet service providers (ISPs) have areas on their websites where local access or toll-free access numbers can be found. Please note that when using the service provider's toll-free access number in lieu of a local access number, a surcharge or per-minute charge is typically added to the subscriber's monthly bill. This will be the subscriber's responsibility to pay and is not reimbursable.

Many national ISPs also have a customer service number to call for the local access number for a given travel destination. Small providers may not have a national access network. The traveler should contact his/her individual service provider for more details.

13 Right to Modify Policy

The American Academy of Orthopaedic Surgeons reserves the right to modify this Travel Policy for Combined NOLC/Fall Meeting at any time. Changes and modifications will be effective when approved and posted.