

# ACTIVITY PROFILE

1. **Name:** Triennial Course in Insurance Medicine 2000
2. **Course Directors:** Rodney Richie M.D., Medical Director, Texas Life Insurance Company, Waco, TX  
Robert Watson M.D., VP & Chief Medical Director, Allianz Life Insurance Company of North America, Minneapolis, MN.
3. **Date:** February 27 - March 4, 2000
4. **Location:** The Westin Mission Hills Resort in Rancho Mirage, CA
5. **Mission:**

The mission of the Triennial Course in Insurance Medicine is to provide an intensive, high quality primer and up-to-date review course of Insurance Medicine, at which the practical knowledge and expertise of experienced Medical Directors is shared with students in small group workshops and platform presentations.

The Course is also an excellent preparatory course for the written exam that is a requirement for board certification in Insurance Medicine. Triennial Course faculty submit questions to the Board of Insurance Medicine that may be included in this exam.

The Course is offered at a single site, over a period of one week, at an interval of every three years.
6. **Needs Analysis:** The Needs Analysis was done using the Core Body of Knowledge of Insurance Medicine (*Exhibit 1*) and an analysis of the evaluation form information of attendees of the 1997 Course. (*Exhibit 2* is a summary of general 1997 Course comments.) A detailed Needs Analysis document for Triennial 2000 has been placed on file.
6. **Learning Objectives:** The learning objectives of the Triennial Course are consistent with the Core Body of Knowledge for Insurance Medicine of AAIM. The significant aspects of Insurance Medicine outlined in The Core Body are taught by means of lectures and workshops utilizing the practical knowledge and expertise of experienced Medical Directors. The specific learning objectives of each lecture and workshop are detailed for every session (*Exhibit 3*).
7. **Intended Audience:** The Course is designed both for physicians who are relatively new to the field of insurance medicine and for physicians who desire a reasonably comprehensive & up-to-date review in the field of insurance medicine.

It is expected that all attendees have some knowledge and experience in insurance medicine prior to taking this Course.
8. **Faculty:** The faculty is comprised of physicians having substantial

experience and expertise in the field of insurance medicine (*Exhibit 4*). Many have done the Triennial Course on one or more prior occasions. Others were chosen for their expertise in a particular area such as cardiology, oncology, cardiology, alcohol and substance abuse, etc., and the important qualification of their being experienced professionals in the field of insurance medicine. All returning faculty members received favorable reviews from the 1997 Triennial Course for their presentation and/or topic content (*Exhibit 5*).

An individual selected to serve on the Triennial Course faculty should be: knowledgeable and credible in the subject matter; a reasonably accomplished speaker/teacher; board-certified in insurance medicine; closely affiliated with insurance medicine in the year of the Course; and capable of cooperating with other faculty members in achieving the learning objectives of the Course.

**9. Content:**

Content is linked to mission and learning objectives and is coordinated so that all desired objectives are illustrated and reinforced. Lectures and workshops cover the fundamental aspects of Insurance Medicine. An optional x-ray conference will also be held for those interested in attending. The lectures cover selected topics in a didactic manner and the workshops provide students with detailed analysis of practical knowledge via case studies in a participatory manner. There are approximately 12 students in each workshop. This small group setting allows for discussion, review of published mortality data, and hands-on training.

Common disorders such as oncology, endocrine disorders, acquired heart disease, and congenital heart disease have both lectures and workshops. Three platform presentations concerning important areas of mortality methodology & statistics are also given to complement the mortality statistics workshop. The topics of MIB, disability, long term care and international underwriting mortality have lectures only. Gastrointestinal disorders, pulmonary disorders, alcohol and substance abuse, renal disorders, hypertension, psychiatry, neurology, psychiatry, autoimmune disorders and rheumatological disorders are presented in workshop form.

**10. Course materials:**

A three-inch binder containing the handouts and cases for the workshops, and handouts for the platform talks, is mailed to the students at least one month before the start of the course to allow time for study. Because a large volume of material is covered, a review of the material is encouraged prior to the start of the Course. Copies of all materials are passed on to the next set of Triennial Course directors for reference in planning the Triennial in 2003.

**11. Mode of presentation:**

The program consists of thirteen 1-hour lectures (1 is optional), one 1½-hour lecture, and thirteen 2-hour workshops. The lectures present predominantly didactic material with some use

of case examples and discussion. The workshops utilize a case clinic structure and discussion, along with some supporting didactic educational materials.

**13. Evaluation & Continuing Education Credits:**

Up to 40.5 credits (with AAIM approval) will be offered for attendance and participation in all sessions and completion of evaluation. Evaluation will be accomplished by written questionnaire (*Exhibit 3*), which will measure the level of clarity, organization, and presentation effectiveness of each speaker; the extent of achievement of the stated learning objectives by each talk and workshop; and the quality & utility of the handouts. It will also enable the collection and analysis of information concerning effectiveness overall Course quality and effectiveness in meeting attendee professional needs and learning objectives that will be used in planning the next Triennial Course.