

Curriculum Vitae: John R. Bowblis

Biographical Summary

Campus Contact Information:

Department of Economics
Miami University
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Education

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| Ph.D. (2008) | Economics, Rutgers University, New Brunswick, NJ |
| M.A. (2004) | Economics, Rutgers University, New Brunswick, NJ |
| B.S. (2002) | Economics (Honors Program), King's College, Wilkes-Barre, PA |

Academic Employment History

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|----------------|--|
| 2019 – Present | Professor of Economics
Department of Economics, Farmer School of Business, Miami University, Oxford, OH. |
| 2022 – Present | Long-Term Care Scholar
Ohio Long-Term Care Research Project, Scripps Gerontology Center, Miami University, Oxford, OH |
| 2010 – Present | Research Fellow
Scripps Gerontology Center, Miami University, Oxford, OH. |
| 2019 – Present | Professor (Courtesy Appointment)
School of Aging, University of South Florida, Tampa, FL. |
| 2017 – 2019 | Endres Associate Professor Fellow
Farmer School of Business, Miami University, Oxford, OH. |
| 2014 – 2019 | Associate Professor of Economics
Department of Economics, Farmer School of Business, Miami University, Oxford, OH. |
| 2008 – 2014 | Assistant Professor of Economics
Department of Economics, Farmer School of Business, Miami University, Oxford, OH. |
| 2003 – 2008 | Instructor
Department of Economics, Rutgers University, New Brunswick, NJ. |
| 2003 – 2008 | Graduate Research Assistant
Institute for Health, Health Care Policy, and Aging Research, Rutgers University,
New Brunswick, NJ. |

Consulting Employment and Affiliations

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|----------------|--|
| 2014 – Present | Academic Advisor
The Brattle Group, Cambridge, MA |
| 2013 – Present | Special Consultant
Economists, Inc., Washington, DC |
| 2007 – 2008 | Research Economist
Princeton Economics Group, Princeton, NJ |

Published and Forthcoming Peer-Reviewed Papers¹

79. Corpora M, **Bowblis JR**, Straker J, Van Haitsma K, Abbott KM. Impact of Implementing the Preferences for Everyday Living Inventory on Nursing Home Survey Deficiencies. *of the American Medical Directors Association*, forthcoming.
78. Bowblis JR, Akosiou O, Ng W, Shippee T. Identifying Nursing Homes with Diverse Racial and Ethnic Compositions: The Importance of Geographic Heterogeneity and Geographic Context. *Medical Care Research & Review*, forthcoming.
77. Kennedy KA, **Bowblis JR**. Does Higher Worker Retention Buffer Against Consumer Complaints? Evidence from Ohio Nursing Homes. *The Gerontologist*, in press.
76. Corpora M, Madrigal C, Moore R, **Bowblis JR**, Straker J, Nelson M, Van Haitsma K, Abbott KM. Exploring the Criterion Validity of Pragmatic Person-Centered Care / Culture Change Measures. *Journal of Applied Gerontology*, in press.
75. Bucy T, Moeller K, Skarphol T, Shippee N, **Bowblis JR**, Winkelmann T, Shippee TP. 2022. Serious Mental Illness in Nursing Homes: Stakeholder Perspectives on the Federal Preadmission Screening Program. *Journal of Aging & Social Policy* 34(5): 769-787.
74. Ng W, **Bowblis JR**, Duan Y, Akosiou O, Shippee TP. 2022. Quality of Life Scores for Nursing Home Residents are Stable Over Time: Evidence from Minnesota. *Journal of Aging & Social Policy* 34(5): 755-768.
73. Peterson L, **Bowblis JR**, Jester DJ, Hyer K. 2022. The Relationship between Staffing Levels and Consumer Complaints in Nursing Homes. *Journal of Aging & Social Policy* 34(5): 742-754.
72. Shippee T, Davila H, Ng W, **Bowblis JR**, Akosiou O, Skarphol T, Thao MS, Woodhouse M, Thorpe R. 2022. Evidence to Inform Policy and Practice: Mechanism to Address Racial/Ethnic Disparities in Nursing Home Quality of Life. *Innovation in Aging* 6(4): 1-15.
71. Xu H, **Bowblis JR**, Caprio TV, Li Y, Intrator O. 2022. Decomposing Differences in Risk-Adjusted Rates of Emergency Department Visits between Micropolitan and Urban Nursing Homes. *Journal of the American Medical Directors Association* 23(8): 1297-1303.
70. Jester DJ, Molinari V, **Bowblis JR**, Dobbs D, Zgibor JC, Andel R. 2022. Abuse and Neglect in Nursing Homes: The Role of Serious Mental Illness. *The Gerontologist* 62(7): 1038-1049.
69. Bucy T, Moeller K, **Bowblis JR**, Shippee N, Fashaw-Walters S, Winkelmann T, Shippee TP. 2022. Serious Mental Illness in the Nursing Home Literature: A Scoping Review. *Gerontology and Geriatric Medicine* 8:1-17.
68. **Bowblis JR**. 2022. The Need for an Economically Feasible Nursing Home Staffing Benchmark: Evaluating an Acuity-Based Nursing Staff Benchmark. *Innovation in Aging* 6(4):1-11.
67. Nasseh, K., **Bowblis JR**. 2022. The Effect on Dental Care Utilization from Transitioning Pediatric Medicaid Beneficiaries to Managed Care. *Health Economics* 31(6): 1103-1128.
66. Shippee T, Fabius CD, Fashaw-Walters S, **Bowblis JR**, Nkimbeng M, Bucy TI, Duan Y, Ng W, Okosiou O, Travers JL. 2022. Evidence for Action: Addressing Systemic Racism across Long-Term Services and Supports. *Journal of the American Medical Directors Association* 23(2): 214-219.
65. Kennedy KA, Abbott KM, **Bowblis JR**. 2022. The One-Two Punch of High Wages and Empowerment on CNA Retention. *Journal of Applied Gerontology* 41(2): 312-321.
64. Xu H, Intrator O, Culakova E, **Bowblis JR**. 2022. Changing Landscape of Nursing Homes Serving Residents with Dementia and Mental Illness. *Health Services Research* 57(3): 505-514.
63. June J, Dobbs F, Molinari V, Meng H, **Bowblis JR**, Hyer K. 2022. Factors Associated with Assisted Living Facility Closure. *The Gerontologist* 62(2): 181-189.
62. Potter A, **Bowblis JR**. 2021. Nursing Home Care Under Medicaid Managed Long-Term Services and Supports. *Health Services Research* 56(6): 1179-89.
61. **Bowblis JR**, Applebaum R. 2021. Prevalence of COVID-19 in Ohio Nursing Homes: What's Quality Got to Do With It? *Journal of Aging & Social Policy* 33(4-5): 414-30.
60. **Bowblis JR**, Ng W, Akosiou O, Shippee TP. 2021. Decomposing Racial and Ethnic Disparities in Nursing Home Quality of Life. *Journal of Applied Gerontology* 40(9): 1051-61.

¹ Co-authors with underlined names worked on the publication as a graduate or undergraduate student.

59. Peterson L, **Bowblis JR**, Jester DJ, Hyer K. 2021. U.S. State Variation in Frequency and Prevalence of Nursing Home Complaints. *Journal of Applied Gerontology* 40(6): 582-9.
58. Kennedy KA, Applebaum R, **Bowblis JR**, Straker JK. 2021. Organizational Factors Associated with Retention of Direct Care Workers: A Comparison of Nursing Homes and Assisted Living Facilities. *The Gerontologist* 61(4): 530-9.
57. Xu H, **Bowblis JR**, Caprio TV, Li Y, Intrator O. 2021. Nursing Home and Market Factors and Risk-Adjusted Hospitalization Rates Among Urban, Micropolitan, and Rural Nursing Homes. *Journal of the American Medical Directors Association* 22(5): 1101-1106.
56. Xu H, **Bowblis JR**, Caprio TV, Li Y, Intrator O. 2021. Rural-Urban Differences in Nursing Home Risk-Adjusted Rates of Emergency Department Visits: A Decomposition Analysis. *Medical Care* 59(1): 38-45.
55. Nasseh K, **Bowblis JR**, Vujcic M. 2021. Pricing in Commercial Dental Insurance and Provider Markets. *Health Services Research* 56(1): 25-35.
54. **Bowblis JR**, Smith A. 2021. Occupational Licensing of Social Services and Nursing Home Quality: A Regression Discontinuity Approach. *Industrial and Labor Relations Review* 74(1): 199-223.
53. Shippee T, Ng W, Duan Y; Woodhouse M, Akosiou O, Chu H, Ahluwalia J, Gaugler J, Virnig B, **Bowblis JR**. 2020. Changes Over Time in Racial/Ethnic Differences in Quality of Life For Nursing Home Residents: Patterns Within and Between Facilities. *Journal of Aging and Health* 32(10): 1498-1509.
52. Kennedy KA, Applebaum R, **Bowblis JR**. 2020. Facility-level Factors Associated with CNA Turnover and Retention: Lessons for the Long-Term Services Industry. *The Gerontologist* 60(8): 1436-44.
51. Xu H, **Bowblis JR**, Li Y, Caprio TV, Intrator O. 2020. Medicaid Nursing Home Policies and Risk-adjusted Rates of Emergency Department Visits: Does Rural Location Matter? *Journal of the American Medical Directors Association* 21(10): 1497-1503.
50. Duan Y, Shippee TP, Ng W, Akosiou O, Woodhouse, M, Chu H, Ahluwalia J, Gaugler, J, Virnig B, **Bowblis JR**. 2020. Unmet and Unimportant Preferences among Nursing Home Residents: What are Key Resident and Facility Factors? *Journal of the American Medical Directors Association* 21(11): 1712-1717.
49. Xu H, Intrator O, **Bowblis JR**. 2020. Shortages of Staffing in Nursing Homes During the COVID-19 Pandemic: What Are the Driving Factors? *Journal of the American Medical Directors Association* 21:1371-1377.
48. Jester DJ, Hyer K, **Bowblis JR**. 2020. Quality Concerns in Nursing Homes that Serve Large Proportions of Residents with Serious Mental Illness. *The Gerontologist* 60(7): 1312-21.
47. Huang S, **Bowblis JR**. 2020. Workforce Retention and Wages in Nursing Homes: An Analysis of Managerial Ownership. *Journal of Applied Gerontology* 39(8): 902-907.
46. Brunt CS, Hendrickson JR, **Bowblis JR**. 2020. Primary Care Competition and Quality of Care: Empirical Evidence from Medicare. *Health Economics* 29(9): 1048-1061.
45. Shippee T, Ng W, **Bowblis JR**. 2020. Does Living in a Higher Proportion Minority Facility Improve Quality of Life for Racial/Ethnic Minority Residents in Nursing Homes? *Innovation in Aging* 4(3): 1-9.
44. Nasseh K, **Bowblis JR**, Vujcic M, Huang S. 2020. Consolidation in the Dental Industry: A Closer Look at Dental Payers and Providers. *International Journal of Health Economics and Management* 20(2): 145-162.
43. Shippee, T, Ng W, Roberts A, **Bowblis JR**. 2020. Family Satisfaction with Nursing Home Care: Findings and Implications from Two State Comparison. *Journal of Applied Gerontology* 39(4): 385-392.
42. Shippee T, Akosiou O, Ng W, Woodhouse M, Duan Y, Thao MS, **Bowblis JR**. 2020. COVID-19 Pandemic: Exacerbating Racial/Ethnic Disparities in Long-Term Services and Supports. *Journal of Aging and Social Policy* 32(4/5): 323-333.
41. **Bowblis JR**, Roberts A. 2020. Cost-effective Adjustments to Nursing Home Staffing to Improve Quality. *Medical Care Research and Review* 77(3): 274-284.
40. Roberts A, **Bowblis JR**, Smith A. 2020. Nursing Home Social Services and Post-Acute Care: Does More Qualified Staff Improve Behavioral Symptoms and Reduce Antipsychotic Drug Use? *Journal of the American Medical Directors Association* 21(3): 388-94.
39. Xu H, **Bowblis JR**, Li Y, Caprio TV, Intrator O. 2020. Construction and Validation of Risk-adjusted Rates of Emergency Department Visits for Long-stay Nursing Home Residents. *Medical Care* 58(2): 174-182.

38. Huang S, **Bowblis JR**. 2019. Is the Quality of Nursing Homes Counter-Cyclical? Evidence from 2001 to 2015. *The Gerontologist* 59(6): 1044-1054.²
37. Huang S, **Bowblis JR**. 2019. Private Equity Ownership and Nursing Home Quality: An Instrumental Variable Approach. *International Journal of Health Economics and Management* 19(3): 273-299.
36. Berish D, Bornstein J, **Bowblis JR**. 2019. The Impact of Long-Term Care Ombudsman Presence on Nursing Home Survey Deficiencies. *Journal of the American Medical Directors Association* 20(10): 1325-1330.
35. Huang S, **Bowblis JR**. 2018. Managerial Ownership in Nursing Homes: Staffing, Quality and Financial Performance. *The Gerontologist* 58(6): 1136-46.
34. Huang S, **Bowblis JR**. 2018. The Principal-Agent Problem and Owner-Managers: An Instrumental Variables Application to Nursing Home Quality. *Health Economics* 27(11): 1653-1669.
33. Akosa Antwi Y, **Bowblis JR**. 2018. The Impact of Nurse Turnover on Quality of Care and Mortality in Nursing Homes: Evidence from the Great Recession. *American Journal of Health Economics* 4(2): 131-161.
32. Roberts A, **Bowblis JR**. 2018. How Does Rurality Influence the Staffing of Social Service Departments in Nursing Homes? *The Gerontologist* 58(3): 540-545.
31. Brunt CS, **Bowblis JR**. 2017. Health Insurer Market Power and Employer Size: An Empirical Evaluation of Insurer Concentration and Wages through Compensating Differentials. *Applied Economics* 49(30): 3005-3015.
30. Roberts A, **Bowblis JR**. 2017. Who Hires Social Workers? Structural and Contextual Determinants of Social Service Staff in Nursing Homes. *Health & Social Work* 42(1): 15-23.
29. Lucas J, **Bowblis JR**. 2017. CMS Strategies to Reduce Antipsychotic Drug Use in Nursing Home Patients with Dementia Show Some Progress. *Health Affairs* 36(7): 1299-1308.
28. **Bowblis JR**, Applebaum R. 2017. How Does Medicaid Reimbursement Impact Nursing Home Quality? The Impact of Small Anticipatory Changes. *Health Services Research* 52(5): 1729-1748.
27. **Bowblis JR**, Brunt CS. 2017. The Effects of Therapist Contracting on For-profit and Not-for-profit Medical Billing Behavior. *Nonprofit and Voluntary Sector Quarterly* 46(6): 1270-1292.
26. **Bowblis JR**, Ghattas A. 2017. The Impact of Minimum Quality Standard Regulations on Nursing Home Staffing, Quality, and Exit Decisions. *Review of Industrial Organization* 50(1): 43-68.
25. **Bowblis JR**, Brunt CS, Grabowski DC. 2016. Competitive Spillovers and Regulatory Exploitation by Skilled Nursing Facilities. *Forum for Health Economics & Policy* 19(1): 45-70.
24. **Bowblis JR**, Horowitz J, Brunt CS. 2016. Ownership Status and Length of Stay in Skilled Nursing Facilities: What Does Treating Ownership as Endogenous Tell Us? *Journal of Applied Gerontology* 35(3): 303-320.
23. **Bowblis JR**, Lucas J, Brunt CS. 2015. The Effects of Antipsychotic Quality Reporting on Antipsychotic and Psychoactive Medication Use. *Health Services Research* 50(4): 1069-87.
22. **Bowblis JR**. 2015. The Cost of Regulation: More Stringent Staff Regulations and Nursing Home Financial Performance. *Journal of Regulatory Economics* 47(3): 325-38.
21. Brunt CS, **Bowblis JR**. 2014. Health IT Adoption, Productivity, and Quality in Primary Care. *Applied Economics* 46(15): 1716-27.
20. Brunt CS, **Bowblis JR**. 2014. Health Insurer Market Power and Primary Care Consolidation. *Economics Letters* 125(1): 61-6.
19. **Bowblis JR**, Brunt CS. 2014. Medicare Skilled Nursing Facility Reimbursement and Upcoding. *Health Economics* 23(7): 821-40.
18. **Bowblis JR**. 2014. Nursing Home Prices and Market Structure: The Effect of Assisted Living Industry Expansion. *Health Economics, Policy and Law* 9(1): 95-112.
17. Lucas J, Chakravarty S, **Bowblis JR**, Gerhard T, Kalay E, Paek E, Crystal S. 2014. Antipsychotic Medication Use in Nursing Homes: A Proposed Measure of Quality. *International Journal of Geriatric Psychiatry* 29(10): 1049-61.
16. **Bowblis JR**, Vassallo A. 2014. The Effect of Closure on Quality: The Case of Rural Nursing Homes. 2014. *Journal of Competition Law & Economics* 10(4): 909-31.

² Received the inaugural Long-term Services and Support Interest Group Publication of the Year Award.

15. **Bowblis JR**, Hyer K. 2013. Nursing Home Staffing Requirements and Input Substitution: Effects on Housekeeping, Food Service, and Activities Staff. *Health Services Research* 48(4): 1539-50.
14. **Bowblis JR**, Meng H, Hyer K. 2013. The Urban-Rural Disparity in Nursing Home Quality Indicators: The Case of Facility-Acquired Contractures. *Health Services Research* 48(1): 47-69.
13. **Bowblis JR**, McHone H. 2013. An Instrumental Variables Approach to Post-Acute Care Nursing Home Quality: Is There a Dime's Worth of Evidence that Continuing Care Retirement Communities Provide Higher Quality? *Journal of Health Economics* 32(5): 980-96.
12. **Bowblis JR**. 2012. Market Structure, Competition from Assisted Living Facilities, and Quality in the Nursing Home Industry. *Applied Economic Perspectives and Policy* 34(2): 238-57.
11. **Bowblis JR**, Crystal S, Intrator O, Lucas J. 2012. Response to Regulatory Stringency: The Case of Antipsychotic Medication Use in Nursing Homes. *Health Economics* 21(8): 977-93.
10. **Bowblis JR**, Lucas J. 2012. The Impact of State Regulations on Nursing Home Care Practices. *Journal of Regulatory Economics* 42(1): 52-72.
9. **Bowblis JR**. 2011. Staffing Ratios and Quality: An Analysis of Minimum Direct Care Staffing Requirements for Nursing Homes. *Health Services Research* 46(5): 1495-1516.
8. **Bowblis JR**. 2011. Ownership Conversion and Closure in the Nursing Home Industry. *Health Economics* 20(6): 631-44.
7. **Bowblis JR**, North P. 2011. Geographic Market Definition: The Case of Medicare Reimbursed Skilled Nursing Facility Care. *Inquiry* 48(2): 138-54.
6. Grabowski DC, **Bowblis JR**, Lucas JA, Crystal S. 2011. Labor Prices and the Treatment of Nursing Home Residents with Dementia. *International Journal of the Economics of Business* 18(2): 273-92.
5. **Bowblis, JR**. 2010. The Decline in Infant Death Rates, 1878-1913: The Role of Early Sickness Insurance Programs. *The Journal of Economic History* 70(1): 221-32.
4. **Bowblis JR**, Yun M. 2010. Racial and Ethnic Disparities in the Use of Drug Therapy. *Social Science Research* 39(4):674-84.
3. Prince J, Akincigil A, Kalay E, Walkup J, Hoover D, Lucas J, **Bowblis JR**, Crystal S. 2008. Psychiatric Rehospitalization among Elderly Persons in the United States. *Psychiatric Services* 59(9): 1038-45.
2. Akincigil A, **Bowblis JR**, Levin C, Jan S, Patel M, Crystal S. 2008. Long Term Adherence to Evidence Based Secondary Prevention Therapies after Myocardial Infarction. *Journal of General Internal Medicine* 23(2): 115-21.
1. Akincigil A, **Bowblis JR**, Levin C, Walkup JT, Jan S, Crystal S. 2007. Adherence to Antidepressant Treatment among Privately Insured Patients Diagnosed with Depression. *Medical Care* 45(4): 363-69.

Select Scientific Publications and Reports (Non-peer Reviewed)

11. **Bowblis JR**, Applebaum R. 2020. Prevalence of COVID-19 in Ohio Nursing Homes. Oxford, OH: Scripps Gerontology Center. Miami University.
10. Applebaum R, Nelson M, Straker JK, Harrington AK, **Bowblis JR**. 2020. Maybe You Can Go Home Again: Ohio's Strategy to Provide Long-Term Services and Supports for a Growing Older Population. Oxford, OH: Scripps Gerontology Center. Miami University.
9. **Bowblis JR**, Smith A. 2019. Occupational Licensing of Social Services and Nursing Home Quality. *Research Briefs in Economic Policy*, no. 193. Cato Institute.
8. **Bowblis JR**, Applebaum R. 2019. Quality of Care in Ohio's Skilled Nursing Facilities: How Are We Doing Compared to the Nation Overall? Oxford, OH: Scripps Gerontology Center. Miami University.
7. Straker JK, **Bowblis JR**, Kennedy K, Harrington AK. 2019. Dedicated Memory Care Units in Ohio's Long-Term Services Settings: Structure and Practices. Oxford, OH: Scripps Gerontology Center. Miami University.
6. Roberts A, Smith AC, **Bowblis JR**. 2019. Impact of Social Service Staffing on Nursing Home Quality and Resident Outcomes. Oxford, OH: Scripps Gerontology Center. Miami University.
5. Nelson M, **Bowblis JR**. 2017. A New Group of Long-stay Medicaid Nursing Home Residents: The Unexpected Trend of those Under 65 Using Nursing Homes in Ohio. Oxford, OH: Scripps Gerontology Center. Miami University.

4. **Bowblis JR**, Applebaum R. 2017. Using National Data to Examine the Quality of Care in Ohio’s Skilled Nursing Facilities. Oxford, OH: Scripps Gerontology Center. Miami University.
3. **Bowblis JR**, Abere, A, 2015. Fit to be Tied? Antitrust Implications of *Collins Inkjet Co. c. Eastman Kodak Co.* Cambridge MA: The Brattle Group.
2. **Bowblis JR**, Applebaum R. 2015. How Does Medicaid Reimbursement Impact the Quality of Ohio Nursing Homes? Oxford, OH: Scripps Gerontology Center. Miami University.
1. Applebaum R, **Bowblis JR**. 2014. A Review of the Reimbursement Approach for Ohio’s Assisted Living Medicaid Waiver Program. Oxford, OH: Scripps Gerontology Center. Miami University.

Select Testimony, Depositions, Declarations, and Expert Reports³

For defendant in evidentiary hearing in *Estate of Dumitru Nicula v. Fair Havens Center, et al.* (Case No. 2016-013583-CA-01, Circuit Court for the 11th Judicial Circuit in and for Miami-Dade County, Florida). Deposition (July 2022). **Primary Litigation Issue and Industry:** Evidentiary hearing regarding staffing and financial documents for a skilled nursing facility.

Ohio General Assembly. “Hearing of the Nursing Facility Payment Commission.” Testimony (July 12, 2022). **Primary Issue:** The Current State of Ohio’s Nursing Home Industry and Ohio’s Medicaid Payment Methodology.

For defendants in *John L. Jarman vs. HCR Manor Care, Inc., et al.* (Case No. RIC 10007764, Superior Court of the State of California for the County of Riverside). Deposition (July 2022). **Primary Litigation Issue and Industry:** Financial condition, facility valuation, and corporate structure associated with a skilled nursing facility.

For defendants in *Sam Rios, Jr., et al., vs. Daisy Holding LLC dba Pine Creek Care Center, et al.* (Case No. 34-2018-00244263, Superior Court of the State of California for the County of Sacramento). Deposition (November 2021; 2 volumes). **Primary Litigation Issue and Industry:** Understaffing in the nursing home industry.

For defendants in *City and County of San Francisco and People of the State of California vs. Melvin Lee et al.* (Case No. CGC-18-565184, Superior Court of the State of California for the County of San Francisco). Deposition (September-October 2021; 3 volumes), Declaration (October 2021), Deposition (August 2022), Trial Testimony (August 2022). **Primary Litigation Issue and Industry:** Contract dispute regarding a residential care facility for the elderly (i.e. assisted living).

For defendants in *Dorothy Phillips, et al. vs. Robinson Nursing and Rehabilitation Center, et al.* (Case No. 60CV-14-4568, Circuit Court of Pulaski County, Arkansas, Sixth Division). Deposition (September 2021). **Primary Litigation Issue and Industry:** Understaffing (class action) in the nursing home industry.

For defendants in *Trudy Rokas, et al., vs. HCR ManorCare, Inc., et al.* (Case No. 21-00483, Superior Court of the State of California for the County of Contra Costa). Deposition (September 2021). **Primary Litigation Issue and Industry:** Understaffing and corporate structure in the nursing home industry.

For defendants in *Alesha Castro, et al., vs. Southwest LTC – Reunion Plaza, LLC et al.* (Case No. 19-0894-C, District Court, 241st Judicial District, Smith County, Texas). Expert Declaration (August 2020), Supplemental Expert Declaration (August 2020), Deposition (October 2020). **Primary Litigation Issue and Industry:** Understaffing and payments to related parties in the nursing home industry.

For defendants in *Carrie Johnson, et al., vs. BLC Lexington SNF, LLC d/b/a Brookdale Richmond Place SNF (KY), et al.* (Civil Case No. 5:19-cv-00064-DCR, United States District Court for the Eastern District of Kentucky). Expert Declaration (March 2020), Deposition (May 2020). **Primary Litigation Issue and Industry:** Inflation of Nursing Home Compare Five-Star Rating (class action fraud) and understaffing in the nursing home industry.

For plaintiffs in *Aetna Inc., et al., vs. Mednax, Inc., et al.* (Civil Case No. 18-cv-2217-WB, United States District Court for the Eastern District of Pennsylvania). Declaration (July 2019), Declaration (January 2020), Declaration (January 2020). **Primary Litigation Issue and Industry:** Upcoding and overbilling (fraud) in neonatal intensive care units (NICUs).

For plaintiffs in *Marion HealthCare, LLC v. Southern Illinois Healthcare* (Civil Case No. 12-cv-00871, United States District Court for the Southern District of Illinois, Benton Division). Expert Declaration (March 2017), Deposition (May 2017), Declaration (November 2019). **Primary Litigation Issue and Industry:** Tying and exclusive dealing of outpatient surgery performed at ambulatory surgery centers and hospitals.

For defendants in *J. B. Poindexter & Co, Inc., et al. v. Kellerman Coachworks, Inc., et al.* (Case No. 2013 CVH 1867, Court of Common Pleas, Clermont County, Ohio). Expert Report (April 2014), Supplemental Expert Report (July 2014), Deposition (August 2014), Rebuttal Expert Report (September 2014), Supplemental Rebuttal Expert Report (October 2014). **Primary**

³ This list contains all matters in which testimony was provided at trial or deposition, and other select matters.

Litigation Issue and Industry: Trade secrets, antitrust sham litigation, and economic damages in Specialty Vehicles - Funeral Hearses.

For plaintiffs in an application for preliminary injunction in *Collins Inkjet Corporation v. Eastman Kodak Company* (Civil Case. No. 1:13-cv-00664-MRB, United States District Court for the Southern District of Ohio, Western Division). Expert Declaration (November 2013), Expert Rebuttal Declaration (November 2013), Deposition (November 2013), Trial Testimony (December 2013). **Primary Litigation Issue and Industry:** Aftermarket economic tying in commercial printers.

Presentations

- 2022: AcademyHealth Annual Research Meeting; The Gerontological Society of America Annual Meeting
- 2021: LTC Risk Forum; Ohio's Board of Executives of Long-Term Services and Support's (BELTSS) Summer Core of Knowledge - Nursing Home Administrator-in-Training Course
- 2020: Miami University; New York State Bar Association Annual Meeting & Expo: Antitrust Law and Corporate Counsel Section
- 2019: 8th Conference of the American Society of Health Economists; AcademyHealth Annual Research Meeting; DRI's Nursing Home/ALF Litigation Seminar 2019; Indiana University; The Gerontological Society of America Annual Meeting; University of South Florida
- 2018: 7th Conference of the American Society of Health Economists; AcademyHealth Annual Research Meeting; American College of Health Care Administrators (University of South Florida Chapter); APPAM Fall Research Conference; Long-Term Services and Supporting Interest Group Annual Meeting; The Brattle Group; The Gerontological Society of America Annual Meeting; University of South Florida; Western Economic Association International Annual Conference
- 2017: 2017 iHEA Biennial World Congress; 21st IAGG World Congress of Gerontology and Geriatrics; Midwest Economics Association Annual Meeting; University of Southern California Schaeffer Center for Health Policy & Economics; Rutgers University
- 2016: 14th Annual International Industrial Organization Conference; AcademyHealth Annual Research Meeting; Midwest Economics Association Annual Meeting
- 2015: 50 Years of Medicare & Medicaid Conference; Mallory-Wilson Center Symposium (Miami University); Midwest Economic Association Annual Meeting; University of Michigan
- 2014: Employment Relations Healthcare Conference; Midwest Economics Association Conference; 5th Biennial Conference of the American Society of Health Economics
- 2013: 11th Annual International Industrial Organization Conference; Midwest Biopharmaceutical Statistics Workshop; Midwest Economic Association Annual Meeting; Southern Economics Association Annual Meetings
- 2012: 4th Biennial Conference of the American Society of Health Economics; Ball State University; Indiana University-Purdue University Indianapolis (IUPUI)
- 2011: 8th World Congress on Health Economics; AcademyHealth Annual Research Meeting; AEA Annual Meetings; Miami University; Midwest Economic Association Annual Meeting; Scripps Gerontology Center; Tulane University; University of South Florida
- 2010: 3rd Biennial Conference of the American Society of Health Economics; Midwest Economic Association Annual Meeting; Scripps Gerontology Center; The Gerontological Society of America Annual Meeting
- 2009: The Gerontological Society of America Annual Meeting
- 2008: Department of Justice – Antitrust Division; DePaul University; Federal Trade Commission; Miami University; Penn State University; RAND; The College of New Jersey; University of Maryland – Baltimore County; University of Nebraska – Omaha; University of North Carolina – Greensboro
- 2007: Rutgers University; University of Medicine and Dentistry of New Jersey

Current Grants

- 2022-2026 Co-Investigator (Principal Investigator of Subcontract). AMDA – The Society for Post-Acute and Long-Term Care Medicine, pass through from the Centers for Disease Control and Preventions (CDC) – NH23IP922655-01-00 (PI: Laxton). “Improving Adult Immunization Rates for COVID-19, Influenza, and Routine Adult Vaccinations through Partnerships with Medical Subspecialty Professional Societies and the Long-Term Care Professional Society.” Funding: \$1,608,786 (Subcontract: \$151,617).
- 2022-2023 Co-Investigator. RTI International, pass through from the Assistant Secretary for Planning and Evaluation (ASPE) (Subcontract PI: Miller/Cohen at University of Massachusetts Boston). “Medicaid Nursing Facility Payment Adequacy: Phases 2 and 3.” Subcontract Funding: \$171,909.
- 2021-2023 Co-Principal Investigator. Ohio Department of Aging (ODA) (PI/co-PI: Applebaum/Nelson/Bowblis). “Providing Data to Improve Long-Term Services in Ohio.” Funding: \$353,377.

2020-2022 Statistical Consultant and Data Analyst. The Donoghue Foundation (PI: Abbott). "The Impact of Person-Centered Care on Nursing Home Quality." Funding: \$125,374.

Completed External Grants

2022 Principal Investigator. RTI International, pass through from the Assistant Secretary for Planning and Evaluation (ASPE) "Comparing Nursing Staff Levels from Medicare Cost Reports and Payroll Based Journal Data."

2022 Principal Investigator. RTI International, pass through from the Assistant Secretary for Planning and Evaluation (ASPE) "Building Nursing Home Direct Care Spending Data Set."

2021-2022 Co-Investigator. RTI International, pass through from the Assistant Secretary for Planning and Evaluation (ASPE) (Subcontract PI: Miller/Cohen at University of Massachusetts Boston). "Medicaid Nursing Facility Payment Adequacy: Phase 1." Subcontract Funding: \$18,841.

2020-2022 Co-Principal Investigator. The Ohio State (OSU), pass through from the Ohio Department of Medicaid (ODM) (PI/co-PI: Applebaum/Heston/Bowblis). "Evaluation of Ohio's MyCare Demonstration." Funding: \$386,989.

2020-2022 Co-Investigator (Principal Investigator of Subcontract). National Institute on Aging (NIA) – 3R01 MD010729-05S1 (PI: Shippee). "System Factors and Racial Disparities in Nursing Home Quality of Life and Care - Alzheimer's Supplement." Funding: \$352,479 (Subcontract: \$23,047).

2016-2022 Co-Investigator (Principal Investigator of Subcontract). National Institute on Minority Health and Health Disparities (NIMHD) – 1R01 MD070729-01 (PI: Shippee). "System Factors and Racial Disparities in Nursing Home Quality of Life and Care." Funding: \$1,771,171 (Subcontract: \$180,213).

2020-2022 Investigator. The Ohio State (OSU), pass through from the Ohio Department of Medicaid (ODM) (PI: Applebaum). "LTC Outbreak Dashboard for Predictive Analytics & Modeling." Funding: \$38,920.

2021 Investigator. AARP (PI: Straker and Nelson). "AARP COVID-19 State Long-Term Care Dashboard: Phase 2." Funding: \$135,288.

2020-2021 Investigator. State of Ohio, Ohio Department of Aging (PI: Applebaum, Nelson). "Long-Term Services Use in Ohio in a COVID-19 World." Funding: \$126,170.

2020-2021 Co-Investigator of Pilot. National Institute on Aging (NIA) – P30AG012810 (PI: Case and Cutler). "NBER Center for Aging and Health Research: Public Reporting of NH Antipsychotic Use: Changes in the Reporting of Exclusionary Diagnoses?" Funding: \$49,877.

2018-2019 Co-Investigator (Principal Investigator of Subcontract). Agency for Healthcare Research and Quality (AHRQ) – 1R03 HS025839-01A1 (PI: Huang). "Quality, Private-Pay Price, and Consumers' Demand for Nursing Home Care." Funding: \$100,000 (Subcontract: \$24,306).

2017-2019 Investigator. State of Ohio, Ohio Department of Aging (PI: Applebaum, Nelson). "Tracking Long-Term Services Use in Ohio: October 2017-June 2019." Funding: \$231,042.

2018 Principal Investigator. The Retirement Research Foundation – RRF Grant #2017-168 (PI: Bowblis, Roberts). "Measuring the Impact of Social Workers on Psychosocial Functioning and Post-Acute Care Discharge." Funding: \$49,321.

2013 – 2015 Investigator. State of Ohio, Office of Medicaid Assistance (OMA) (PI: Applebaum, Mehdizadeh). "Measuring Ohio's Progress in Achieving a Balanced System of Long-Term Services and Support." Funding: \$458,221.

2012 – 2013 Investigator. Ohio Department of Job and Family Services (ODJFS) (PI: Applebaum, Mehdizadeh). "Proposal to Provide Data to Improve Ohio's Long-Term Services and Supports System: Phase II" Funding: \$221,634.

2007 – 2009 Graduate Assistant and Co-Investigator. Retirement Research Foundation - RRF# 2007-152 (PI: Lucas, Crystal). "Patterns and Guideline Consistency of Antipsychotic Drug Use In Nursing Homes."

2005 – 2009 Graduate Assistant. National Institute of Mental Health (NIMH) - 1R01 MH076206-01 (PI: Crystal). "Depression Care among Elderly Nursing Home Residents."

Completed Internal Grants

- Summer 2018 Principal Investigator. Miami University Farmer School of Business Summer Research Grant; Department of Economics Summer Research Grant. (PI: Bowblis). “Does Private Equity Ownership of Health Care Facilities Lead to Higher Costs? An Instrumental Variable Approach to Medical Billing and Coding.” Funding: \$11,000.
- Summer 2017 Principal Investigator. Miami University Department of Economics Summer Research Grant. (PI: Bowblis). “Physician Competition and Quality of Care: Empirical Findings from Medicare’s Physician Quality Reporting System.” Funding: \$6,000.
- Summer 2016 Principal Investigator. Miami University Summer Research Appointment; Grant to Promote Research; and Farmer School of Business Summer Research Grant. (PI: Bowblis). “Systematic Biases in the Size and Professional Composition of Inspection Teams: Consequences on the Nursing Home Inspection Process.” Funding: \$15,400.
- Summer 2015 Principal Investigator. Miami University Farmer School of Business Summer Research Grant; Department of Economics Summer Research Grant. (PI: Bowblis). “The Impact of Nurse Turnover and Quality of Care: Evidence from the Great Recession.” Funding: \$7,000.
- Summer 2014 Principal Investigator. Miami University Farmer School of Business Summer Research Grant; Department of Economics Summer Research Grant (PI: Bowblis). “The Effect of Stringent Nurse Staffing Regulations on Nursing Home Financial Performance.” Funding: \$7,000.
- Summer 2013 Principal Investigator. Miami University Department of Economics Summer Research Grant. (PI: Bowblis). “Competitive Spillovers and Regulatory Exploitation by Skilled Nursing Facilities.” Funding: \$6,000.
- Summer 2012 Principal Investigator. Miami University Summer Research Appointment; Grant to Promote Research; and Farmer School of Business Summer Research Grant. (PI: Bowblis). “Market Structure and Continuing Care Retirement Communities.” Funding: \$15,000.

Editorial Boards

2018 - Present *Journal of Aging & Social Policy*

Awards and Honors

- *Senior Faculty Award for Research Excellence*, Farmer School of Business, Miami University, 2022.
- *Researcher of the Year* award that recognizes individuals in Ohio’s aging network whose research advanced knowledge that have improved services for older adults, advanced knowledge of the aging process, or supported the expansion of research in the aging field in Ohio or nationally. Ohio Association of Gerontology and Education (OAGE), 2022.
- *Long-term Services and Support Interest Group Publication of the Year Award* for outstanding publication in 2019 that advances knowledge regarding policy or practice related to healthcare and social services for individuals living with chronic and disabling conditions, their families and caregivers, and/or their service providers. AcademyHealth, 2020.
- *James Robeson Junior Faculty Research Excellence Award*. Farmer School of Business, Miami University, 2016
- *The Leo Award* for recognition of outstanding achievement in professional achievement who graduated within 15 years. King’s College, 2016.
- *Excellence in Career Development Award* in recognition of supporting of career development services to undergraduate students. Miami University, 2016.
- *Most Outstanding Research Submitted for Presentation* at the AcademyHealth Annual Research Meeting, 2011.
- *2nd Best Poster in Drug Utilization Studies Special Interest Group* at the 25th International Conference on Pharmacoepidemiology & Therapeutic Risk Management (ISPE), 2009.
- *Peter Asch Memorial Scholarship* for Outstanding Research in Applied Microeconomics. Department of Economics, Rutgers University, 2007.
- *Sidney I. Simon Award for Excellence in Undergraduate Teaching*. Department of Economics, Rutgers University, 2006.
- *Graduate Fellowship*. Department of Economics, Rutgers University, 2002-2003.
- *Aquinas Society*. King’s College, 2002.
- *Omicron Delta Epsilon Economic Honor Society*. King’s College, 2001.
- *Moreau Scholarship*. King’s College, 1999-2002.

Courses Taught

Miami University – Economics Undergraduate (Fall 2008 – Fall 2022) – 47 sections:

Antitrust and Damages (3 times):	Fall 2021; Spring 2019, 2020
Examining Economic Data and Models (21 times):	Fall 2008, 2009 (x2), 2012-2013 (x2); 2017 (x2); 2019 Spring 2009, 2011 (x2), 2012, 2015-2017 (x2), 2018
Health Economics (18 times):	Fall 2011 (x2), 2014 (x2), 2015 (x2), 2018 (x2); 2020 (x2), 2022 (x2) Spring 2010, 2013, 2014, 2021, 2022(x2)
Economics of Regulation (2 times):	Spring 2013, 2014
Principles of Microeconomics (1 time)	Summer 2017
Dept. Honors: Economics of Antitrust (1 time):	Fall 2011
Topics in Industrial Organization and Litigation (1 time):	Spring 2022

Miami University – Economics Masters (Spring 2009 – Spring 2012) – 4 sections:

Topics in Microeconomics (Industrial Organization of the Healthcare Sector) (4 times): Spring 2009-2012

Rutgers University – Economics Undergraduate (Summer 2003 – Summer 2010) – 17 sections:

Health Economics (7 times):	Spring 2007, 2008 (x2); Summer 2005, 2007, 2008, 2010
Econometrics (7 times):	Fall 2005, 2006 (x2); Spring 2005-2007; Summer 2006
Introduction to Microeconomics (2 times):	Summer 2003-2004
Money and Banking (2 times):	Fall 2003-2004
Intermediate Microeconomics (1 time):	Spring 2004

Student Advising (Completed)

Ph.D Level

Miami University – Ph.D. in Social Gerontology

2021: Katherine Kennedy (Co-Chair)

2018: Diane Berish

Rutgers University – Ph.D. in Economics

2022: Ze Song

2013: Xuelian Zhang

University of Rochester Medical Center – Ph.D. in Health Services Research & Policy

2019: Huiwen Xu

University of South Florida – Ph.D. in Aging Studies

2022: Kallol Kumar Bhattacharyya

2021: Dylan Jester

2020: Joseph W. June

2018: Kelly M. Smith

M.A. Level

Miami University – Masters in Economics:

2022: Aaron Garner

2021: Elliott Crummer (Chair)

2020: Harrison Fox (Chair); Mackenzie Zielinski (Chair)

2018: Jameson Foran (Chair)

2015: Alex McCorkle (Chair); Neel Shivdasani

2013: Collin English (Chair)

2012: Heather McHone (Chair); Keith Meyers; Marc PunKay

2010: Kurtis Grimes; Paige Iversen; Joseph Keller

2009: Phillip North (Chair)

Undergraduate Level

Miami University – University Honors – Chair:

2012: Andrew Ghattas

Miami University – Departmental Honors – Chair:

2021/2022: Isabella Mancini

2020/2021: Elliott Crummer

2018/2019: Madison Cain

2017/2018: Jameson Foran

2016/2017: Harrison Fox

2015/2016: Derek Hoodin

2013/2014: Adam Motley

2012/2013: Benjamin Heebsh

2011/2012: Clark Johns

Ad Hoc Peer Review and Discussant Services

Ad Hoc Journal Peer Reviews:

American Journal of Health Economics

American Journal of Public Health

American Journal of Managed Care

Applied Economics

BMC Health Services Research

BMJ Quality & Safety

Canadian Journal of Aging

Demography

Drugs & Aging

Economic Inquiry

Economic Modelling

Evaluation & the Health Professions

Health Affairs

Health Economics

Health Policy

Health Services Insights

Health Services Research

Innovation in Aging

Inquiry

International Journal of Geriatric Psychiatry

Journal of Aging and Health

Journal of Aging & Social Policy

Journal of Applied Economics and Policy

Journal of Applied Gerontology

Journal of the American Geriatrics Society

Journal of the American Medical Directors Association

Journal of Gerontology: Social Sciences

Journal of Gerontological Social Work

Journal of Health Economics

Journal of Health Politics, Policy and Law

Journal of Human Resources

Journal of Law & Economics

Journal of Policy Analysis and Management

Journal of Regulatory Economics

Medical Care

Medical Care Research and Review

Milbank Quarterly

Nonprofit and Voluntary Sector Quarterly

PLUS ONE

Public Policy & Aging Report

Review of Industrial Organization

The Gerontologist

Ad Hoc Grant Reviews:

Foundation for Informed Medical Decision Making (FIMDM)

National Science Foundation (NSF)

Ad Hoc Scientific Committee and Conference Reviews:

AcademyHealth Annual Research Meeting – Aging, Disability, and End-of-Life Theme, 2021

AcademyHealth Annual Research Meeting – Aging, Disability, and End-of-Life Theme, 2020

9th Conference of the American Society of Health Economists, 2020

AcademyHealth Annual Research Meeting – Aging, Disability, and End-of-Life Theme, 2019

8th Conference of the American Society of Health Economists, 2019

AcademyHealth Annual Research Meeting – Aging, Disability, and End-of-Life Theme, 2018

AcademyHealth Long-Term Services and Support Interest Group Meeting, 2018

7th Conference of the American Society of Health Economists, 2018

21st IAGG World Congress of Gerontology and Geriatrics, 2016

6th Biennial Conference of the American Society of Health Economists, 2016

AcademyHealth Long-Term Services and Support Interest Group Meeting, 2016

5th Biennial Conference of the American Society of Health Economists, 2014
AcademyHealth Annual Research Meeting – Aging Theme, 2014

Discussant:

- 2022: 11th Conference of the American Society of Health Economists; Annual Midwest Health Economics Conference (MHEC)
2019: 8th Conference of the American Society of Health Economists; Bloomington Mini Health Economics Conference
2018: 7th Conference of the American Society of Health Economists; Annual Midwest Health Economics Conference (MHEC); APPAM Fall Research Conference; ENSC Health Economics and Policy Conference
2017: Midwest Economic Association Annual Meeting; AcademyHealth’s Long-Term Services and Support Interest Group Meeting
2016: 6th Biennial ASHEcon Conference; 14th Annual International Industrial Organization Conference; Midwest Economic Association Annual Meeting
2015: 6th Annual Midwest Health Economics Conference (MHEC); Midwest Economic Association Annual Meeting
2014: 5th Annual Midwest Health Economics Conference (MHEC); Midwest Economic Association Annual Meeting
2013: 4th Annual Midwest Health Economics Conference (MHEC); 11th Annual International Industrial Organization Conference; Midwest Economic Association Annual Meeting; Southern Economics Association Annual Meetings
2012: 3rd Annual Midwest Health Economics Conference (MHEC); 4th Biennial Conference of the American Society of Health Economics
2011: 2nd Annual Midwest Health Economics Conference (MHEC); Midwest Economic Association Annual Meeting
2010: 3rd Biennial Conference of the American Society of Health Economics; Midwest Economic Association Annual Meeting

Select Quotes in Print, Online, Radio and Television Media (Original Outlet)

Print and Online

AARP Bulletin; American College of Physicians Advocate; Bloomberg Law; Boise Weekly; Cincinnati Enquirer; Columbus CEO; Columbus Dispatch; Dayton Daily News and Affiliates; Forbes; McKnight’s Long-term Care News; Pittsburgh Tribune- Review; PBS Frontline; Plains Dealer; ProPublica; Provider Magazine; The Capital Times; TD Ameritrade: Ticker Tape Monthly; U.S. News and World Reports; WOSU News

Radio

Bloomberg Radio: The Hays Advantage; NPR; NPR Affiliate Radio WYSO; WHIO Reports

Television

WHIO Reports (Dayton); Fox19-WXIX-TV (Cincinnati)

Other Professional Service

Service to Profession

2015–2019 AcademyHealth’s Long-Term Services and Support Interest Group Advisory Committee

Service to Community

2013–2015 United Way of Oxford, Ohio and Vicinity, Board Member

Service to Miami University

University Level

2021-Present Miami Retirement Advisory Committee
2019-Present Benefits Committee (*Chair* 2019–Present)
2012–2014 Graduate Achievement Fund Committee
2013 Ad Hoc Reviewer for Committee on Faculty Research, Faculty Research Grants Program
2010–2013 Faculty Adviser to Fraternity
2011 Greek Awards Judge

Divisional Level (Farmer School of Business)

2010–Present Career Services Committee (*Chair* 2015–2021)
2014–2020 Committee for the Evaluation of Administrators (*Chair* 2015–2020)
2017 Ad Hoc Recruiting Committee for FSB Career Services Director

Department Level (Economics)

2021-Present	Full Professor Committee (<i>Chair</i> 2021-Present)
2021-Present	Research Committee (<i>Chair</i> 2022-Present)
2019–2021	Governance Committee
2016–2020	Student Placement/Recruiting Committee
2015–2017	Research Committee
2014–2018	Tenure Track Recruiting Committee (<i>Chair</i> 2016–2017)
2012–2015	Undergraduate Studies Committee
2011–2013	Placement Committee
2011	Ad Hoc Honors Review Committee
2008–2011	Graduate Studies Committee