



CALIFORNIA SOCIETY FOR HEALTHCARE RISK MANAGEMENT 43RD ANNUAL EDUCATION CONFERENCE



CONFERENCE BROCHURE



MARCH 6 - 8, 2024

**NAPA VALLEY MARRIOTT AND SPA
3425 SOLANO AVE., NAPA, CALIFORNIA**

The 2023-2024 Board of Directors of CSHRM proudly welcomes you back to the 43rd Annual Education Conference in beautiful Napa Valley. We hope that you find this to be an interactive Conference that provides you with an exciting and distinctive blend of informative discussions and intellectual presentations along with useful networking and socializing opportunities. This Conference represents the full spectrum of the healthcare risk management industry and provides a unique opportunity for professionals to openly exchange information and ideas that truly allow you to connect with risk management professionals, claims representatives, attorneys and other healthcare related personnel.

The CSHRM Board of Directors and speakers hope and believe that you will find the 2024 Conference to be a rewarding and worthwhile event.

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CONFERENCE SCHEDULE OF SPEAKERS, TOPICS AND EVENTS

DAY ONE - WEDNESDAY, MARCH 6, 2024

1:00 p.m.

Grand Ballroom

Welcome to the Conference – Introductory Remarks

Kathleen Lozano - CSHRM Board President

1:00 - 2:00 p.m.

Grand Ballroom

Legal Barriers to Reproductive Medicine Post-Dobbs

J. Julia Hansen-Arenas, Esq. - Hassard Bonnington, LLP



This session will provide insight into the impact and evolving implications of the Supreme Court's reversal of Roe v. Wade on the healthcare industry in California and beyond. The presentation will cover a broad overview of the history of reproductive choice in this country and discuss the changes that have occurred since the 2022 Supreme Court decision. These changes will influence medical decision making in reproductive medicine, telehealth, and healthcare education for many years to come.

2:00 - 3:00 p.m.

Grand Ballroom

Tele-Critical Care: More than just eyes in the sky

Elizabeth Scruth, Ph.D., RN - Kaiser Permanente Northern California



Kaiser Permanente is in the process of implementing Tele-Critical Care (TCC; i.e., virtual, overnight intensive care physician and nursing support) across our 21 Northern California ICUs with a goal of completing full implementation by the end of 2024. Preliminary analyses in our two pilot ICUs in the pre-COVID period were suggestive of improved quality outcomes with TCC, including reduced mortality and decreased length of stay. Upon completion of this session, participants will be able to describe the implementation of a tele-critical care program to reduce risk and improve clinical outcomes, define current regulations around tele-critical care and required licensing, and describe how proactive and reactive monitoring accompanied by risk scores provide for complete oversight of intensive care.

3:00 - 3:15 p.m.

Grand Foyer

Afternoon Break

Enjoy an afternoon break and socialize with our Sponsors and Exhibitors

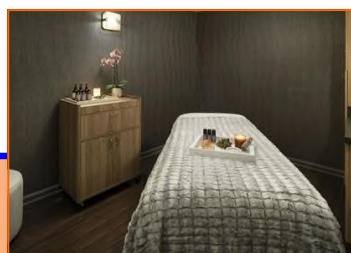
3:15 - 4:15 p.m.

Grand Ballroom

Far From Footloose: Meet the New "103" Nurse Practitioner

Edward S. Fabi, Esq. - Sutter Health

Surani Hayre-Kwan, DNP, MBA, FNP-BC, FACHE, FAANP - Sutter Health



DAY ONE SCHEDULE - CONTINUED

4:15 - 5:15 p.m.
Grand Ballroom

California Law Update: Recent Case Decisions/Legislative Activity & Implications HRM

Scott Buchholz, Esq. - Dummit, Buchholz & Trapp



This presentation will highlight select California state court decisions affecting healthcare. The overview of California decisional law will cover a wide range of issues, including professional liability, dispositive motions, MICRA, peer review, damages as well as other issues pertaining to substantive and procedural law.

5:30 - 6:30 p.m.
Redwood Grove

Welcome Reception

CSHRM invites all Conference attendees to meet and socialize with each other and the CSHRM Board.



DAY TWO - THURSDAY, MARCH 7, 2024

7:30 - 8:30 a.m.
Grand Foyer

Continental Breakfast



8:30 a.m.
Grand Ballroom

Day Two: Welcome and Opening Remarks

Kathleen Lozano - CSHRM Board President

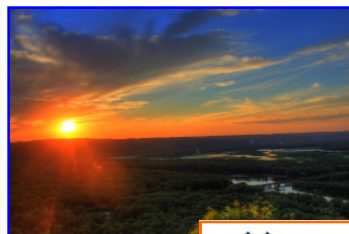
8:30 - 9:30 a.m.
Grand Ballroom

Making the Unconscious Conscious: Understanding and Mitigating Bias

Mikael Villalobos, Ed.D. - U.C. Davis



Bias, in its most simplistic definition, is having a preference for one thing over another. Also, biases come into play in our impressions and judgment of people, especially those whose identities and experiences are different from our own. This session will explore how we make snap judgments about people by understanding our socialization that informs our biases. Participants will be introduced to theory and language in understanding implicit and explicit bias. Through personal reflection, participants will gain greater awareness when they engage in bias and gain essential knowledge and skills in how they recognize and mitigate biases in both personal and professional domains.



DAY TWO SCHEDULE - CONTINUED

9:30 - 10:30 a.m.

Grand Ballroom



Healthy Workforce: Enhancing MSD Prevention through Risk Assessment and Innovative Solutions

Kristie Elton, MSPT, CPHRM, CHSP - UCOP Risk & Safety Solutions

Moira Heilmann, MS - UCOP Risk & Safety Solutions

Musculoskeletal disorders (MSDs) are both common and costly, posing a significant financial burden on US companies, with direct costs alone reaching 50 billion dollars, as reported by the CDC. In this session, we will explore how UC, California's largest employer, is proactively addressing musculoskeletal health through system-wide initiatives. By deploying advanced assessment solutions, UC aims to curtail ergonomics compliance risks, enhance overall productivity, and increase UC's bottom line. The presentation will include effective techniques for implementing ergonomics programs, navigating challenges in ergonomics management, and showcasing how UC leverages acquired insights and tools to make well-informed decisions, ensuring the maintenance of a healthy workforce. Participants will gain a comprehensive understanding of the staggering economic impact of MSDs on US companies and the pivotal role employers play in promoting musculoskeletal health. They will learn how proactive risk assessments can serve as a vital strategy for identifying potential problem areas and facilitating practical workplace adjustments. Participants will leave with practical insights on how to leverage these learnings and tools to make informed decisions, create a healthier work environment, and encourage employees to adopt habits that prevent and alleviate MSDs.

10:30-10:45 a.m.

Grand Foyer

Morning Break

Enjoy this opportunity to grab a drink, catch-up with colleagues and visit our Sponsors and Exhibitors

10:45-11:45 a.m.

Grand Ballroom



KEYNOTE SPEAKER

The Whole Community: It's About All of Us

Vance Taylor - California Governor's Office of Emergency Services

Understanding the harsh inequities of how disasters affect communities, California established the Office of Access and Functional Needs (OAFN) within the California Governor's Office of Emergency Services (Cal OES). In this presentation, Mr. Taylor will share the most current lessons learned to promote safety before, during, and after emergencies taking place to ensure the most successful outcomes to integrate the needs of individuals with disabilities, older adults, and all people with access and functional needs. OAFN utilizes a whole community approach by offering training and guidance to emergency managers and planners, assisted living communities, disability advocates, and other service providers responsible for planning for, responding to, and helping whole communities prepare for, respond to, and recover from disasters. This presentation will outline lessons learned and best practices participants can use to further their current planning processes, efforts, and inclusive initiatives.

11:45 - 1:15 p.m.

Pool/Patio Area

Lunch Break

**Enjoy a casual lunch outside
and another opportunity to
mingle with friends and connect
with colleagues**



DAY TWO SCHEDULE - CONTINUED

1:15 - 2:15 p.m.
Grand Ballroom



Artificial Intelligence/Generative Artificial Intelligence: Healthcare Exposures and Associated Liability

Henry Yuan, BA - Marsh; Nicole Francis, BBA - Marsh; Sheila Brunsell, BBA - Marsh; and, Lisa Phillips, BS, CIPP/US - Marsh

This session will examine the potential for Artificial Intelligence/Generative Artificial Intelligence (AI/GAI) Related Exposures and Associated Liability within the healthcare industry. During the session, we provide an overview of utilization of AI/GAI in healthcare and present various healthcare scenarios and examine how various existing insurance policies (healthcare professional liability, products, cyber/technology EO, employment practices liability and directors and officers) may respond to various claims of liability arising from utilization of AI/GAI. The panel will also explore the potential data security and privacy concerns related to AI/GAI tools and processes. Lastly, we will provide perspective on whether and how existing insurance coverage will continue to respond to such claims arising and whether new policies are likely to arise.

2:15 - 3:15 p.m.
Grand Ballroom



A Day in the Life of an Investigation

Joan M. Porcaro, RN, BSN, MM, CPHRM - WTW
Judy L. Klein, BS, PA, CHPRM, FASHRM - MedPro Group

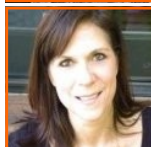
The session will provide attendees with the necessary information and guidance to conduct a thorough clinical investigation. Speakers will provide attendees with key principles and methods for conducting an investigation, including first steps to take following the event, legal basics, disclosure, and conducting a root cause analysis. Whether you are a new or a seasoned risk management professional, this session will equip you with the tools you need to feel confident in your investigative strategies.

3:15 - 3:30 p.m.
Grand Ballroom

Afternoon Break

Stand up, stretch and say hello to friends and Sponsors.

3:30 - 4:30 p.m.
Grand Ballroom



Ambulatory Care: Using Claims Data to Mitigate Risk

Heidi McCoy - Coverys
Marlene Icenhower - Coverys

Diagnostic error is responsible for the majority of medical malpractice claims that originate in the ambulatory care setting. These claims often involve a missed or delayed diagnosis of cancer and result in high indemnity payments. In this program, participants will learn the root causes of diagnosis-related claims and will explore strategies for reducing the risk of these claims including the importance of obtaining comprehensive histories and physicals, management of test results, documentation and communication. We will also discuss strategies for managing the provider patient relationship by managing patient expectations, responding to negative patient behaviors and when necessary, terminating the provider-patient relationship.



DAY TWO SCHEDULE - CONTINUED

**5:00 - 6:30 p.m.
Patio/Pool Area**

President's Reception



Event generously sponsored by:



DAY THREE - FRIDAY, MARCH 8, 2024

**7:30 - 8:30 a.m.
Grand Foyer**

Hot Breakfast



Breakfast Sponsored by



**8:30 a.m.
Grand Ballroom**

Day Three: Welcome and Opening Remarks

Kathleen Lozano - CSHRM Board President

**8:30 - 9:30 a.m.
Grand Ballroom**

Patients Without Families, Ethical & Legal Consideration

Josh Hyatt, DHS, MBE, MHL, DFASHRM, CPHRM, CPPS - Coverys



This session will address the intricate ethical and legal dimensions associated with unrepresented patients —individuals without family or legal guardians to advocate on their behalf. We will examine the multifaceted challenges healthcare providers encounter when making crucial decisions for these individuals, including issues of autonomy, beneficence, and justice. By delving into case studies and real-world scenarios, we will provide practical strategies for navigating these ethical dilemmas. This will empower healthcare professionals with a robust framework to ensure unrepresented patients receive the highest standard of care while respecting their autonomy. By addressing these interconnected objectives, this presentation seeks to equip healthcare professionals with the knowledge and tools necessary to adeptly navigate the intricate ethical and legal considerations surrounding unrepresented patients. Through this comprehensive approach, we aim to ensure the well-being of these individuals and uphold their rights within the healthcare system.

**9:30 - 10:30 a.m.
Grand Ballroom**

Legislative Update

Jackie Garman, J.D. - CHA



This popular annual session provides an overview of new state laws and regulations specific to healthcare and of particular interest to healthcare risk managers.



DAY THREE SCHEDULE - *CONTINUED*

10:30-10:45 a.m.

Grand Foyer

Morning Break

Enjoy a final chance to grab a drink, mingle with colleagues and visit our Sponsors and Exhibitors

10:45-11:45 a.m.

Grand Ballroom

Panel Discussion: Hot Topics and Ethical Concerns Risk Professionals Deal With

Kathleen Lozano - UCSF Fresno Health Education Program

Rebecca Lowell, Esq. - Schaeffer • Cota • Rosen, LLP

Daniel Wainwright, Esq. - McCormick Barstow, LLP



This panel discussion with two malpractice defense lawyers and a Hospital risk manager will address some of the current ethical issues and concerns regarding “consent” and “conditions of admissions” and other current problems facing medical providers and their defense lawyers.

11:45 a.m.

Grand Ballroom

Final Remarks, Thanks and Adjournment of 2024 Conference

CALIFORNIA SOCIETY FOR HEALTHCARE RISK MANAGEMENT 43RD ANNUAL EDUCATION CONFERENCE



CONFERENCE SPONSORS

THE BOARD OF DIRECTORS OF CSHRM WISH TO THANK THOSE WHO HAVE GRACIOUSLY AND GENEROUSLY SPONSORED THE 2024 CONFERENCE. WITHOUT THE SUPPORT OF OUR SPONSORS THIS WONDERFUL CONFERENCE AT THIS AMAZING LOCATION WOULD HAVE NEVER OCCURRED.

AS SUCH, THE BOARD OFFERS ITS UTMOST APPRECIATION FOR THE FINANCIAL BACKING IT HAS RECEIVED FOR THIS YEAR'S CONFERENCE FROM THE FOLLOWING SPONSORS:



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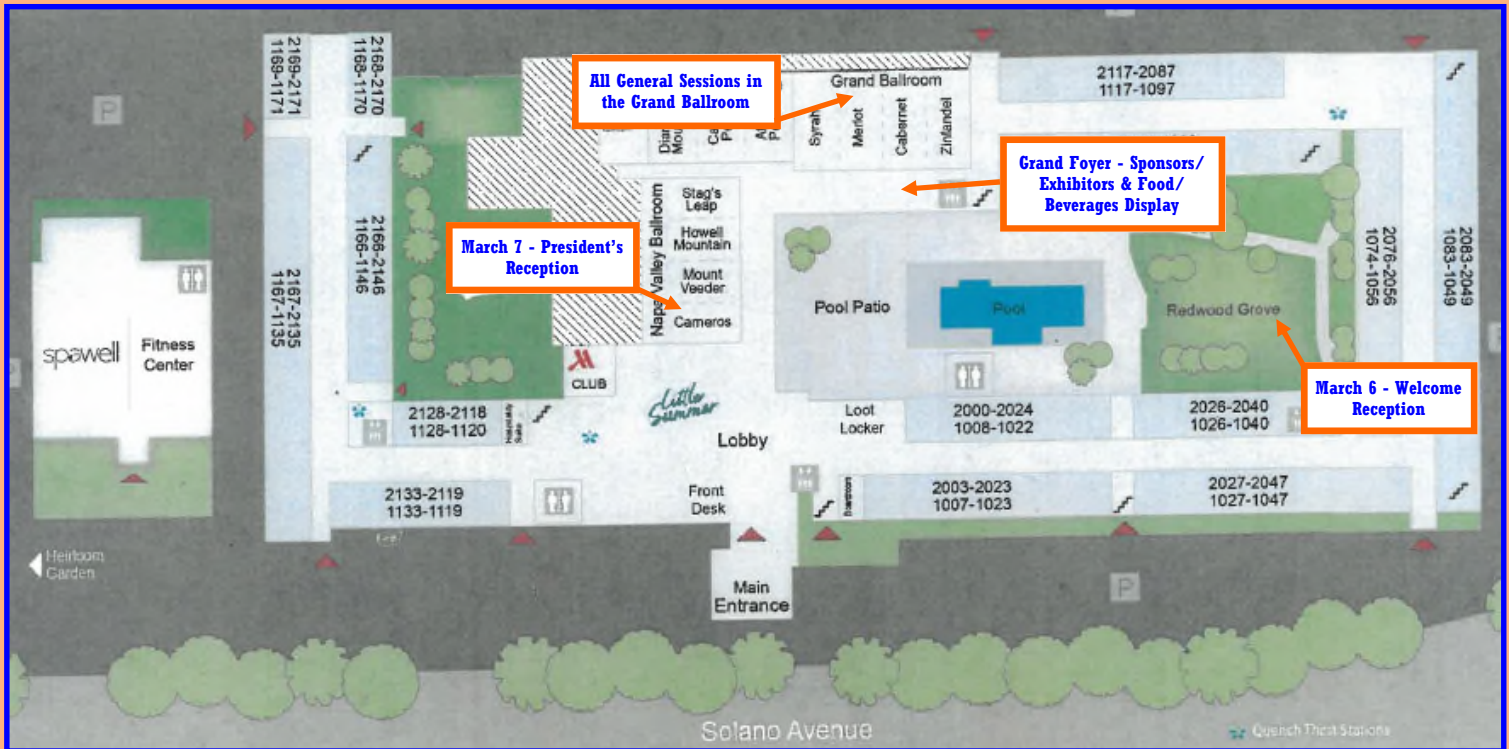
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RESORT MAP & EVENT LOCATIONS



CONTINUING EDUCATION INFORMATION

This meeting has been approved for a total of 13.0 contact hours of Continuing Education Credit toward fulfillment of the requirements of ASHRM designations of FASHRM (Fellow) and DFASHRM (Distinguished Fellow) and towards CPHRM renewal. Day One = 4.0 hours; Day Two = 6.0 hours; and, Day Three = 3.0. Total of 13.0 hours.

PENDING APPROVAL — CSHRM is awaiting approval by the National Association for Healthcare Quality (NAHQ) for CPHQ continuing education hours and the amount of approved hours will be determined by the Conference.

CSHRM is also an approved CEU Provider (#4506) with the California Board of Registered Nursing. 13.0 contact hours will be awarded for this program. Day One = 4.0 hours; Day Two = 6.0 hours; and, Day Three = 3.0. Total of 13.0 hours.

CERTIFIED PROFESSIONAL IN PATIENT SAFETY: This activity meets the criteria of the Certification Board for Professionals in Patient Safety for up to 13.0 CPPS CE hours.

The Compliance Certification Board (CCB)® has approved this event for up to 15.6 Live CCB CEUs, based on a 50-minute hour, each.

PENDING APPROVAL – Continuing Legal Education credits offered by the State Bar of California will be offered for this Conference. The exact amount of hours for the particular sessions have not yet been finalized; but, they will by the time of the Conference.

REFUND POLICY

If an attendee needs to cancel at any time prior to the conference's cancellation deadline date of **February 29, 2024**, we offer credits towards the following year's conference. All cancellation requests must be made in writing prior to **February 29, 2024**, to info@cshrmca.org. Registrants who fail to attend the conference without prior notification of cancellation will be assessed the full conference fee.

LET'S PLAN ON MEETING AT CSHRM'S 44TH ANNUAL CONFERENCE IN 2025

THE CSHRM BOARD OF DIRECTORS "THANK YOU" FOR ATTENDING OUR 2024 ANNUAL CONFERENCE. IT WAS GREAT SEEING EVERYONE!!