
**Wisconsin Society for Healthcare Risk Management
Spring Conference**

May 3, 2024

**Adapting to Uncertainty
in an Ever-Changing
Legal and Risk Landscape**



SPRING CONFERENCE AGENDA

May 3, 2024 - Virtual Conference

7:40am	Web Access Open	
7:50 – 8:00am	WELCOME	Tami Waterman, WSHRM President
8:00 – 9:00am	Protecting the Workplace from Violence & Minimizing Legal Exposures	Ann Barry Hanneman, Esq Michael R. Scherer, Esq von Briesen & Roper, SC
9:00 – 10:00am	AI in Healthcare: Examining the Matrix of Risk & Opportunities	Bradley E. Byrne, Jr, Esq Jennifer Freeden, Esq, CPHRM ProAssurance
10:00 – 10:15am	Break	
10:15 – 11:15am	State Capitol Update: Politics and Policy	Mark M. Grapentine, JD Wisconsin Medical Society
11:15 – 12:15pm	Advance Practice Providers: Claims Trends, Risk Mitigation & Patient Safety Strategies	Summer Heil, JD Susan Morelli, RN, BHA, MPA MedPro Group
12:15 – 1:00pm	Lunch Break	
1:00 – 2:00pm	When Healthcare Providers Need to Interact with Law Enforcement	Jonathan A. Porter, Partner Husch Blackwell
2:00 – 3:00pm	Changing Landscape with Wisconsin Juries	Sean Gaynor, Attorney Leib Knott Gaynor, LLC
3:00 – 3:10pm	Break	

3:10 – 4:10pm

Allegations of Abuse by Staff: Developing a Response Plan

Austin D. Auleta
Dann W. Brown
SSM Health

4:10 – 4:20pm

CLOSING REMARKS & RAFFLE*
*Must be present (via Zoom) to win

Tami Waterman, WSHRM
President

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PRESENTATION OBJECTIVES

Protecting the Workplace from Violence & Minimizing Legal Exposures

- Identifying workplace violence, common examples of workplace violence and the legal obligations of employers
- Provide steps employers should consider regarding workplace violence liability
- Discuss policy options and practical applications to provide a safe workplace

AI in Healthcare: Examining the Matrix of Risk & Opportunities

- Understand the current and future uses of AI in healthcare
- Identify patient safety issues and liability risks associated with incorporating AI into healthcare
- Implement strategies to decrease liability risk and improve patient safety when utilizing AI in your practice

State Capitol Update: Politics and Policy

- Learn the health policy highlights of the 2023-24 state legislative biennium
- Learn how changes at the state Supreme Court could affect physician liability exposure
- Learn how new state legislative election maps in 2024 can impact upcoming state legislatures

Advance Practice Providers: Claims Trends, Risk Mitigation & Patient Safety Strategies

- Enhance knowledge of current medical malpractice litigation claims trends and outcomes for Advance Practice Providers.
- Understand the value Advance Practice Providers bring to the healthcare team and community
- Understand how to mitigate risk of medical malpractice litigation for the healthcare team and hospitals by enhancing patient safety strategies to inherent barriers

When Healthcare Providers Need to Interact with Law Enforcement

- Understand the legal tools available to law enforcement and obligations they create on recipients
- Understand how those tools interact with other legal requirements on healthcare providers, like HIPAA
- Learn how healthcare providers can plan for successful interactions with law enforcement far in advance of any event that could give rise to law enforcement's involvement in the provider's operations.

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PRESENTATION OBJECTIVES

continued

Changing Landscapes with Wisconsin Juries

- Understand the current trends and biases being exhibited by juries
- Understand areas where juries are focusing their decisions
- Understand how to help evaluate and address issues at the front-line level to avoid and/or lessen the possibility of adverse jury verdicts

Allegations of Abuse by Staff: Developing a Response Plan

- Be able to identify seven elements and the government agencies that must be considered when responding to an allegation of abuse by a staff member
- Understand the investigative process from the point of receiving an allegation to the determination of it having occurred
- Be able to identify immediate steps that can be taken to protect patients in response to receiving an allegation of abuse by a staff member

Spring Conference May 3, 2024 SPEAKERS



**Ann Barry Hanneman, Esq.
von Briesen & Roper, S.C.**

Ann Barry Hanneman is an Attorney with von Briesen & Roper, S.C. focusing on Labor and Employment Law. Ann's practice focuses on employment discrimination, negotiating separation agreements, handling sexual harassment complaints, drafting employee handbooks, developing policies, drafting non-compete agreements and managing wage and hour matters.

Ann has successfully tried federal court jury trials, and regularly represents employers in administrative matters as well as federal and state court proceedings. She provides management training for companies on a wide range of employment topics.



**Michael R. Sherer, Esq.
von Briesen & Roper, S.C.**

Michael Sherer is an Attorney with von Briesen & Roper, S.C. focusing on Labor and Employment Law. Michael focuses his practice on employment law counseling, collective bargaining, contract administration, employment litigation and representation before the NLRB. He has significant experience in employment litigation and specifically with handling wage and hour claims, employment discrimination, Title I of the American with Disability Act and wage garnishment cases.

Michael is admitted to practice law in both Wisconsin and Illinois.



Bradley E. Byrne, Jr, Esq.
Senior Risk Management Consultant
ProAssurance

Senior Risk Management Consultant for ProAssurance, advising physicians, other healthcare providers, and practice administration professionals on healthcare risk management and professional liability issues.

In private practice Bradley handled a diverse range of civil cases focusing on Title VII civil rights claims, business development, and athlete representation. He is a member of the Alabama Bar Association, the Birmingham Bar Association, the American Society for Healthcare Risk Management, and the Alabama Society for Healthcare Risk Management.



Jennifer Freeden, Esq, CPHRM
Regional Risk Management Manager
ProAssurance

Regional Risk Manager for ProAssurance.

In private practice, Jen litigated medical professional liability cases. For over a decade, serving as Associate General Counsel and Risk Manager for a Federally Qualified Health Center, Jen was involved in all aspects of the day-to-day legal, regulatory, operational, and risk management issues of the facility. Jen is licensed to practice law in Texas, California, and Pennsylvania. She is a member of the Texas State and Austin Bar Associations, the American Society for Healthcare Risk Management, and the South Texas Society for Healthcare Risk Management.



Mark Grapentine, JD
Chief Policy and Advocacy Officer
Wisconsin Medical Society

As Chief Policy and Advocacy Officer, Mark is responsible for representing and protecting the interests of more than 10,000 Wisconsin Medical Society members at the state and federal level. Mark is in his second stint with the Society, rejoining the organization in September 2020 after a year at the Wisconsin Hospital Association as their Vice President of Communications. His first period with the Society was from 2003 through August 2019, eventually as the Senior Vice President of Government Relations.

Before joining the Society in 2003, Mark was chief of staff to former State Senator Peggy Rosenzweig (2001-02), Policy Advisor to former Governor Tommy G. Thompson (1998-2001), and legislative assistant to former State Assembly Representative Scott Walker (1997-98).

Mark is a 1997 graduate of the University of Wisconsin Law School. He graduated from the University of Wisconsin in 1990, majoring in journalism and political science. In between degrees Mark was a television sports anchor and reporter at WKOW-TV, the ABC affiliate in Madison. He is married (Wendy Warren) and has two children: a son, Jordan (27) and a daughter, Lexey (25).



Summer Heil, JD
Claims Manager
MedPro Group

Summer Heil brings her extensive experience as both a litigator and a corporate health care attorney to MedPro Group. As a partner in two Chicago law firms, she practiced in the areas of medical malpractice, toxic torts, product liability, and health care compliance.

She also served as General Counsel of an emergency medical services provider with operations in four states. A graduate of Indiana University and DePaul University College of Law, Summer joined MedPro Group in 2014. She now serves as Division Claims Manager for the Midwest region and National Account Claims Leader. Summer's experience both in and out of the courtroom gives her a unique perspective as she helps MedPro policyholders navigate the litigation process.



Susan Morelli-Puricelli, RN, BHA, MPA
Senior Risk Solutions Consultant
MedPro Group

Susan is a Senior Risk Solutions Consultant for MedPro's Midwest region and provides services to healthcare systems, hospitals, practices, and facilities. She has more than 25 years of experience in the healthcare industry working in clinical practice, risk, quality, patient safety, workplace safety, infection control, regulatory compliance, and consulting.

Susan's extensive clinical and healthcare leadership responsibilities focused on care transformation and redesign, clinical excellence, performance and quality improvement, and safety design initiatives and efforts. Strategic focus areas included redesign of the medical staff office, including professional practice evaluation; clinical documentation improvement programs; system redesign of risk/quality/ safety program(s); assessment and workplace safety design; system-wide falls reduction programs; and system collaborations focused on risk reduction and communication in the areas of obstetrics, operating room, emergency department (ED), and behavioral health. These efforts included assessment, policy/procedure review, education, and collaborative design implementation strategies.

In previous roles, Susan's clinical-expertise-focused areas included hospital and system behavioral health; ED (trauma); orthopedics; and nursing care in hospitals, ambulatory care, and home healthcare.

Susan is a registered nurse and has a bachelor's degree in healthcare administration and a master's degree in public health administration. She is a member of the American Society for Health Care Risk Management, the Illinois Society for Health Care Risk Management, and the National Association for Healthcare Quality. She also has a patient safety certificate from John Hopkins–Armstrong Institute for Patient Safety and Quality.



**Jonathan A. Porter, Partner
Husch Blackwell**

A former federal prosecutor, Jonathan Porter counsels companies and individuals through their toughest and most complex legal situations.

Jonathan focuses on white collar criminal defense, federal investigations brought under the False Claims Act, and litigation against the government and whistleblowers, with an emphasis on matters within the healthcare industry. Clients nationwide seek Jonathan's experience in guiding them through federal investigations.

Jonathan also teaches white collar crime as an adjunct law school professor.



**Sean Gaynor, Attorney
Shareholder
Leib Knott Gaynor, LLC**

Sean Gaynor is a litigation attorney and shareholder with the law firm of Leib Knott Gaynor located in Milwaukee, Wisconsin.

He is a former President of WSHRM and the current President-Elect. Sean has focused his practice entirely on the defense of health care professionals in court matters as well as in licensing actions. Sean represents health care providers throughout the State of Wisconsin and the Midwest.



Austin D. Auleta, JD
Risk Manager
SSM Health

Austin Auleta is a Risk Manager supporting both acute and ambulatory facilities for SSM Health. Prior to joining the risk management team, Austin worked in SSM's Regulatory Compliance and Accreditation department.

Austin completed his Bachelor of Arts at the University of Wisconsin – Eau Claire and earned his Juris Doctor degree from the University of Wisconsin Law School. Before joining SSM Health, Austin practiced as an attorney at a law firm in Wisconsin.



Dann W. Brown, DFASHRM, CPHRM
System Director of Risk Management Programs & Services
SSM Health

Dann has over three decades of healthcare experience including periods as a nurse manager and ICU nurse educator. He has been dedicated to the arenas of healthcare risk management and patient safety for nearly two decades.

He is a past president of the North Texas Society for Healthcare Risk Management. He has served on several ASHRM committees as well as presented at national and regional affiliate conferences. He is also a contributing author of the Fundamentals of Healthcare Risk Management Handbook and the latest edition of the CPHRM Review Manual.