



**CMSNE's 2024 Building Strategies for Success Conference**  
**Innovative Approaches to Case Management:**  
**The 4 'C's' of Capacity, Complex Cases, Critical Conversations & Caregiver Support**



SATURDAY, SEPTEMBER 21, 2024 - 8 am – 1:30 pm EST  
This conference has been approved for 5 CCM, RN & SW credits

**Special thanks to the conference supporters:**



Acceptance of support from this sponsor in no way implies endorsement of their products and/or services by CMSNE/NEAOHN and the program's accreditation agencies.

**Welcome the conference will begin promptly at 8 AM**



Special Thanks and Appreciation to our conference exhibitors for without their support we would not be able to bring you this conference.

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Family First is the leader in caregiving solutions as an employee & insurance benefit. Our experts and proprietary technology tools are improving the health and wellbeing of caregivers and their loved ones — and directly impacting the quality and cost of care. Drawing off 35+ years of clinical and industry experience our services uncover and solve all aspects of caregiving through the analysis of clinical, psychosocial, and financial data. The Family First approach addresses caregiving needs holistically; addressing mental health, social isolation, family dynamics, care coordination, advocacy, and financial challenges while validating and empowering caregivers across the world. In this way, we ensure a comprehensive solution, opposed to one that is fragmented or incomplete.

For additional information on Family First visit:

<https://www.family-first.com/>

Sara MacDonald, RN, CCM, CPC (she/her/hers), Chief Operating Officer  
 617-415-1685 [smacdonald@family-first.com](mailto:smacdonald@family-first.com)

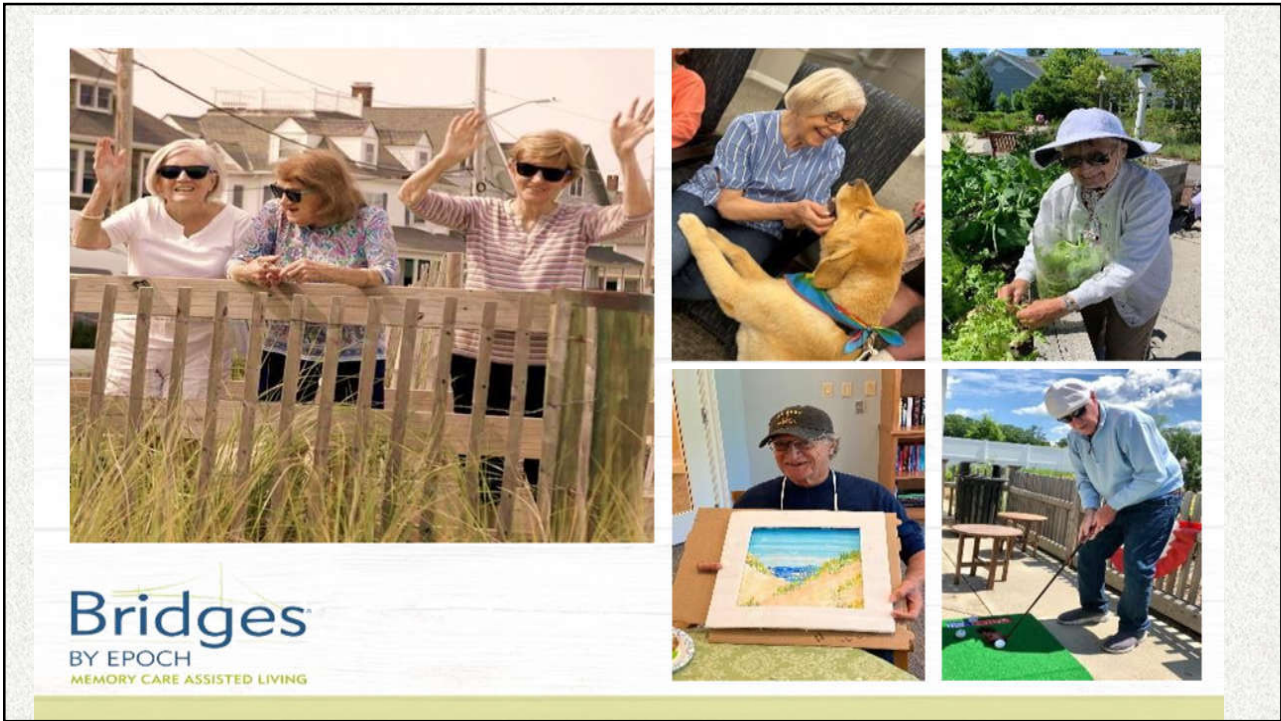




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Case Management Society of New England

[WWW.CMSNE.org](http://WWW.CMSNE.org)

The Case Management Society of New England (CMSNE), is the New England Chapter of the Case Management Society of America (CMSA), a multidisciplinary, interdisciplinary network of healthcare professionals working in the specialized practice of case management.

Our Chapter members hail from Massachusetts, Rhode Island, Maine, New Hampshire and Vermont.





## JOIN CMSA – CMSNE TODAY

Considering joining?

National dues \$170, plus local chapter MA1 New England \$35 = \$205



Scan QR code or join online at CMSA website

<https://cmsa.org/membership/individual-membership/>

\*Be sure to join MA1 – New England Chapter

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## CMSNE 2024-25 NEWLY ELECTED BOARD

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## Upcoming Webinars and Conferences

Register online at CMSNE website

- **Thursday, October 24, 2024 – 2:00 PM – *Functional Capacity Evaluations, Work Hardening and Work Conditioning*** – in person  
NHADA, Bow, NH
- **Friday, November 15, 2024 – 12 noon – NEAOHN & CMSNE LUNCH and LEARN – *Concussion in the Workplace – Webinar***
- **Friday, December 6, 2024 – 12 noon – NEAOHN & CMSNE LUNCH and LEARN – *Cannabis in the Workplace – Webinar***



### ***The Ethical Evolution of Healthcare – Keeping it Human***

**Saturday, November 2, 2024**

**8:00 AM – 4:30 PM**

**Elks Lodge, Portland, ME**

**6 RN, SW & CCM Ethics Credits**

***Artificial Intelligence – Is it a Professional Case Manager's Friend or Foe?***

*Lynn S. Muller, JD, BA-HCM, CCM, RN*

***Redefining Utilization Management: The Role of AI***

*Miriam Moerbe, MS, BSN, RN, Sr Clinical Integration Analyst at MCG Health*

***Our Health Systems: Is it Age-Friendly?***

*Peter Baker, LCSW, MaineHealth, Program Manager: Geriatrics,  
Centers for Health Improvement, Healthy Aging*

***Finding the Voice of the Patient in our Automated World:  
The Role of AI in the Interpretation and Translation Industry***

*Malvina Gregory, Director, MaineHealth Interpreter & Cross Cultural Services*

***Meeting People Where They're At:***

***Mobile Health and Harm Reduction for Patient Experiencing Homelessness***

*Malia Haddock, MS, PMHNP-BC, lead clinician, CONNECT Program*





### CMSA Case Management Week Events Free to both members and non-members

**October 13, All Day:** Connect with your community + earn a chance to win by participating in our CM WEEK TREASURE HUNT and engaging on CMSA socials — Facebook, LinkedIn, Instagram & X

**October 14, 5:30pm Eastern:** Join CMSA President, Janet Coulter, your friends and colleagues as we celebrate YOU, the practice of case management and all you've accomplished over the past year at our CASE MANAGER MIXER. Be sure to sport your CMSA and CM Week gear and add a #CMWeek2024 Zoom background!

**October 15, 2pm Eastern:** **WEBINAR: Advancing DEIB and Health Equity in Professional Case Management Practice** Presented by Michael Garrett, MS, CCM, CVE & Ellen Fink-Samnick, DBH, MSW, LCSW, ACSW, CCM, CCTP, CRP, FCM

**October 16, 1pm Eastern:** **WEBINAR: Primary Care and Behavioral Health: "Better Together"** Presented by Jin Yoon-Hudman, MD

**October 17, TBA:** **WEBINAR: AI & Ethics: Exploring Intelligence and Integrity in Case Management** - PANEL Discussion

**October 18, 10am Eastern:** **Mini-WEBINAR + Chair Yoga: It's Not About Touching Your Toes: Chair Yoga for Busy Case Managers** Presented by Sarah Stevenson, LICSW, NSW-C, CCM

**October 19, 12pm Eastern:** **CASE MANAGER COLLABORATION - LIVE NETWORKING SESSION** - Join Janet Coulter and other case management leaders for CASE MANAGER COLLABORATION, sharing successes and story-based evidence on the power of case management



**2025 CMSA Annual  
Conference Call for  
Presentations is  
NOW OPEN**

**Submission Deadline  
10/31/24**



# **Meet our Speakers for Today**

*"The content and views presented in this program are those of the independent speaker, while CMSNE endorses the pursuit of educational opportunities attendees should exercise their own professional and independent judgment when interpreting the content of the program".*

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### **Trancy B. Escobar, MBA, CMAC**

Trancy is an experienced case management leader with over 17 years of Case Management experience across varied roles. Her case management roles have included Operations, Appeal/Denial Management, Complex Care, Post-Acute strategy, acute care leadership, EHR case management system implementations and case management analytics. She is currently the Mass General Brigham, Executive Director of Complex Care and Care Continuum. She co-authored a case management article "Optimization of Patient Progression in a New Era: A comprehensive Framework" with Professional Case Management. Trancy completed her undergraduate studies at UMass Amherst, completed a Master of Business Administration– Healthcare Concentration at Fitchburg State University, attained a Project Management certificate at UMass Boston, attained the ACMA Case Management Administration Certification in 2022 and is Epic ClinDoc certified. Trancy is passionate about the case management practice, patient advocacy and equity of care. Outside of work, Trancy is dedicated to her family, a soccer mom to her three children.



### **Sheridan Bergdorf, LSW**

Sheridan is a graduate of Franklin Pierce University 1993, Bachelor of Social Work & Counseling.

Sheridan previously served as the Brigham Interim Complex Care Director helping to support and advocate for our most vulnerable patients. Sheridan previously worked for the Spaulding Rehabilitation Network/Mass General Brigham Home Care, where she has supported Brigham & Women's/Brigham Faulkner family for 18 years. As a licensed social worker, Sheridan began her career helping people with physical, emotional, and behavioral disabilities @ Germaine Lawrence Intensive. Her desire to advocate for marginalized populations brought her to Jewish Memorial Hospital in Roxbury. It was there that she began her career in case management as a discharge planner. Sheridan learned how to navigate, advocate for, and support discharge opportunities for disadvantaged patients. With these tools, Sheridan moved into various post-acute leadership roles including Director of Social Work, Director of Admissions, Marketing and Clinical Liaison.

Sheridan currently guides the day-to-day operations of the Brigham Complex Care Team, as the Complex Care Director of the Care Continuum Management at Brigham & Women's Hospital and helps to support the discharge needs for their patients, including Brigham Faulkner. Sheridan has been integral support to the Mass General Brigham staff and patients for many years. She brings to the Care Continuum Management Team not only her wealth of post-acute experience, advocacy, leadership, and collaboration, but also strives to create a strategic approach to pathway innovation for the complex patient population.





### **Elaine Bruner, MSN, CMGT-BC**

Elaine is an experienced nurse and case manager. After completing her undergraduate studies at SUNY/Plattsburgh, Elaine re-located to Virginia to begin her nursing career. In 1991, she received an MSN from the University of Virginia. Elaine attained Nurse Case Management certification with the ANA/ANCC in 2002. Her case management roles have included acute care, brain injury rehabilitation and community-based care. Elaine is passionate about case management practice and certification. She co-authored the ANA/ANCC case management review products and continues to coach nurse case managers to success in certification. Elaine is an active educator, offering continuing education programs for regional and national conferences. In 2008, Elaine was recognized by the Case Management Society of America with the Award of Service Excellence. Her current case management position is with the US Navy in Virginia Beach, VA.



### **Sara MacDonald, RN, CCM, CPC**

Sara is a registered nurse certified case manager, certified professional coach, and leader in her field. She has spent over a decade working with medically complex patients in different healthcare settings. Prior to joining Family First, Sara spent several years leading and educating a team of case managers and transitional care managers for South Shore Health Systems. Before her time at South Shore Health, Sara spent six years leading clinical operations for Best Doctors — the leader in telephonic, expert medical opinion. Here she led the success of the organization's operations for large health plans and their employer clients. Sara has been a caregiver most of her adult life helping her son and loved ones navigate complex mental health, neurodevelopmental disorders and other complex conditions, such as COPD and cancer. Sara is a member of the Organization of Nurse Leaders and the Case Management Society of America. She earned her BSN from the University of Massachusetts, where she is currently pursuing an MBA.





### **Kerri Sennott, RN, ACM-RN**

Kerri, a Clinical Manager at Family First brings a wealth of expertise in subacute care, oncology, and acute-level case management to her role as Clinical Manager at Family First. She leads a dedicated team of Care Experts and Care Associates focused on enhancing caregiver support and wellness, thus impacting the overall healthcare system. Previously, Kerri served as a Nurse Clinical Leader in the Department of Care Progression at South Shore Health, where she spent over 15 years in various capacities. Her commitment to caregiving extends beyond her professional life; she has provided care for her children and multiple family members, including her mother, a Stage IV Breast Cancer survivor. Kerri is an active member of the Case Management Society of America and the Case Management Society of America New England chapter. She is currently completing her Bachelor's degree in Nursing at Southern New Hampshire University, further enriching her knowledge and skills in healthcare management and support.



### **Rebecca Wershba, PhD**

Dr. Wershba is the founder of Boston Metro Neuropsychology. She earned her doctorate in Clinical Psychology at Arizona State University and completed her internship at the Tucson VA Hospital. Her postdoctoral training at UMass Medical Center involved assessment of patients across the lifespan, from children to geriatrics, with neurological concerns including dementing disorders, movement disorders, epilepsy, brain tumors, ADHD, and learning disorders. She trained at the Cambridge Health Alliance where she conducted assessments of adult patients with complex psychiatric or substance use histories, as well as patients with a range of educational experiences and diverse backgrounds. Dr. Wershba additionally completed an advanced postdoctoral fellowship at MGH within the Home Base Program, focusing on patients with mild traumatic brain injury, and (often) comorbid substance use and/or mood disorders. She has specialized training in evaluations of capacity and competency in older adults.

