Fall Forum 2026 — Trust, Transparency, and Privilege: Navigating Patient Safety Privilege and Disclosure in Modern Healthcare

Activity Date: Thursday, October 29, 2026 | 2:00–5:00 PM CT
Venue: Hotel ZaZa, 5701 Main St., Houston, TX 77005
Website: https://ghshrm.starchapter.com/meetinginfo.php?id=37&ts=1785437657

This live activity offers CE credit for:

1. Nurses / Nurse Practitioners (ANCC)
2. Other*

**All other attendees will receive a Certificate of Attendance*

Faculty

Panel 1 — Patient Safety Work Product Privilege: What It Is and How to Maximize Protections

Lauren Virene, JD
- Senior Managing Counsel, Texas Children's Hospital

Claudia Cantu, JD
- Associate General Counsel, Risk, Insurance & Litigation, Texas Children's

Colin Goodman, JD
- Partner, Spencer Fane LLP

Cesar Lopez, JD
- Healthcare Counsel

Panel 2 — Balancing Privilege and Transparency: Patient Communication After an Adverse Event

Mayson Planck, JD
- Senior Associate Attorney, Baylor College of Medicine

Taylor Taylor, JD
- Serpe Andrews

Tracy Perez, RN, MSN, CPHRM
- Director of Risk Management, Memorial Hermann The Woodlands Medical Center

Kelli Newman, APR
- President, Newman & Newman, Inc.

Statement of Need

Healthcare professionals involved in patient safety, risk management, quality improvement, legal affairs, and organizational leadership frequently face challenges balancing two critical responsibilities following adverse events: conducting candid internal patient safety reviews and communicating openly with patients and families. Many organizations lack a clear understanding of how Patient Safety Work Product (PSWP) protections can be effectively established, maintained, and defended while also meeting expectations for transparency, regulatory compliance, professional responsibility, and compassionate disclosure. As a result, organizations may inadvertently compromise privilege

protections, create inconsistency in adverse event responses, or miss opportunities to strengthen patient trust and safety culture.

This educational activity addresses these gaps by providing an interdisciplinary examination of Patient Safety Work Product protections, governance, litigation considerations, and the ethical responsibilities associated with preserving confidentiality, exercising sound professional judgment, and communicating with integrity following adverse events. Participants will gain knowledge and strategies to strengthen patient safety programs, preserve protected patient safety activities, improve communication practices, support organizational learning and risk reduction, and promote accountability and trust within healthcare organizations.

Learning Objectives

1. Define and distinguish the key elements that qualify information as Patient Safety Work Product (PSWP) and differentiate PSWP from documents and information that remain discoverable in litigation or regulatory proceedings.
2. Analyze strategies for incorporating event analyses and related materials into a Patient Safety Evaluation System (PSES) to strengthen privilege protections and support compliance with patient safety requirements.
3. Evaluate the legal, operational, and insurance risks associated with improper documentation, maintenance, or protection of information within a PSES and their impact on privilege preservation.
4. Explain the key principles of effective communication with patients and families following an adverse event, including the roles of transparency, empathy, timely disclosure, and ongoing engagement.
5. Analyze strategies for balancing patient disclosure obligations with the preservation of legal, peer review, and patient safety protections during adverse event investigations and follow-up communications.
6. Evaluate common operational, communication, and legal risks associated with adverse event disclosure and determine approaches that promote trust, support resolution, and protect organizational review processes.

Financial Support

There is no commercial support associated with this educational activity.

Target Audience

Healthcare risk managers, patient safety professionals, attorneys, quality and performance improvement leaders, nurses, physicians, and healthcare executives who are dedicated to advancing patient safety, improving organizational response to adverse events, and strengthening communication practices across the continuum of care.

Credit Information

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Faculty Disclosures

Lauren Virene, JD; Claudia Cantu, JD; Colin Goodman, JD; Cesar Lopez, JD; Mayson Planck, JD; Taylor Taylor, JD; Tracy Perez, RN, MSN, CPHRM; and Kelli Newman, APR, have nothing to disclose.

Planning Committee Disclosures

Daniela Jones, MA; Stacey Day, MSN, RN, CPHRM, SCRN; Mayson Planck, JD; and Lauren Virene, JD, have nothing to disclose.

Content Reviewer Disclosures

Andrea Perseghin, EdD, has nothing to disclose.

**All relevant financial relationships have been mitigated.*

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Questions about this activity? Greater Houston Society for Healthcare Risk Management — Stacey Day, MSN, RN, CPHRM, SCRN | sday@houstonmethodist.org | 936-270-2774