



# Patient Safety & Risk Management

## Popular Courses

Copic is dedicated to serving as your trusted resource for professional education. The seminars listed below have been identified as this year's most timely and relevant topics we offer. *Please note: changes to these activities may have occurred since publication. For current seminar and course information, please go to [www.copic.com/education](http://www.copic.com/education), or contact Carmenlita Byrd at [cbyrd@copic.com](mailto:cbyrd@copic.com).*

### 1) Copic Corner: A Customized Copic Presentation for Your Group or Facility

What trends are you seeing in your practice? What new issues have arisen that you would like to explore with the facilitator and participants in this free-form discussion? This is a customizable Copic presentation that can be designed to address the questions and concerns in a particular medical or practice setting and allows for direct access to a Copic expert. Learning objectives will be determined based on the content of the presentation.

### 2) Major Risks: Specialty Specific Issues

1 CME credit

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|--|---|----------------------|---------------------------------|
| • Anesthesiology & Interventional Pain | • Gastroenterology                        | • OB/GYN             | • Psychiatry                    |
| • Cardiology                           | • Hospitalists                            | • Ophthalmology      | • Radiology                     |
| • Emergency Medicine                   | • Internal Medicine and IM Subspecialties | • Orthopedic Surgery | • Specialty and General Surgery |
| • Family Medicine                      | • Neurology                               | • Pediatrics         | • Urology                       |
|  |   | • Plastic Surgery    |                                 |

As part of our efforts to address the needs of key medical specialties, Copic created seminars that cover current issues/trends. Our physician risk managers will give an overview of common and emerging high-risk scenarios for providers and then present illustrative cases based on actual medical liability lawsuits from the Copic files. Our goals are to keep you informed of critical risk areas, reduce your chances of being named in a lawsuit, offer insight to enhance patient safety, and create a forum for providers to discuss challenges they are facing.

- Articulate major patient safety and lawsuit risk areas in daily practice.
- Anticipate high-risk clinical scenarios in different care settings and actions to prevent adverse outcomes.
- Describe clinical situations where enhanced physician-patient shared decision making can improve patient safety.
- Analyze situations that may increase risk for systems failures that lead to patient risk.

### 3) Maximizing Safe and Effective Practice with Physicians, PAs, and NPs

1 CME credit

To create a safe and effective practice, we'll review regulatory and scope of practice elements for physicians who work with and supervise PAs and NPs.

- Identify the relevant PA/NP regulations.
- Illustrate examples of high-risk clinical scenarios.
- Utilize a toolkit to work more safely and effectively with PAs and NPs.

### 4) Tales from the Hotline: How Would You Handle These Medicolegal Hotline Calls?

1 CME credit

Sixteen years of experience from Copic's Risk Management Hotline, staffed by physician risk managers, are distilled into memorable vignettes that illustrate challenges and engage the audience in how to properly respond to important medicolegal considerations.

- Demonstrate how to manage unusual medicolegal situations that inevitably arise in medical practice.
- Recognize when you can access assistance from Copic's Risk Management Hotline.
- Discuss the importance of following state medical board regulations.

**5) Copic 3Rs and Candor Update: More Cases, Successes, and Good News**

Copic's nationally recognized 3Rs Program is a practical application of the principles of transparency and accountability in situations that involve unanticipated outcomes. These same principles are also applied during the Candor process in Colorado, Iowa, and Utah, and other relevant states. This seminar examines program history, use, and practical concerns of disclosure and resolution.

- Familiarize audience with program history, operational parameters, and results.
- Formulate common sense guidelines for communicating with patients who have experienced an unanticipated outcome.
- Differentiate between the terms "error" and "unanticipated outcome."

**6) Is It Just "Culture" or Is It "Just Culture"?**

An exploration of the concept of "Just Culture," which focuses on accountability and open communication. The discussion reviews the guidelines for addressing provider behavior that is fair to the individual while maintaining accountability and improving patient care.

- Describe dynamics of accountability versus blame-free guidelines.
- Illustrate the individual versus institutional responsibilities.
- Identify and develop policies which reflect those competing needs.

**7) Medication Errors in the Electronic Age****1 CME credit**

Medication errors continue in the era of EHRs, e-prescribing, and computerized physician order entry. Using a series of case-based examples, this seminar explores how these errors occur and suggests practical approaches to reduce them.

- Review strategies to avoid medication errors and mitigate their effects.
- Summarize the complex causes, attitudes, and systems that contribute to these types of errors, as well as potential suggestions and solutions to reduce them.
- List trends in claims and occurrences and describe actions to decrease medication errors.

**8) Minors and Risk: Immunizations, Pregnancy, STI, Addiction, Mental Health, Custody Battles, and More!****1 CME credit**

Dealing with children and adolescents can be complex with an array of legal and regulatory issues that impact your role and responsibility as a medical provider. Learn the common areas of confusion when working with minors and how to avoid potential non-compliance.

- Recognize and understand the common legal issues facing healthcare providers involved in treating minors as they apply to consent for treatment, access to medical information, and reporting obligations.
- Identify where the law has changed so it can be applied in the provider's practice.
- Review strategies for complying with the complex laws that apply in these situations.

**9) Opioids I—Best Practices for Opioid and Benzodiazepine Management Using State and CDC Guidelines****1 CME credit**

In response to the opioid epidemic and the role of healthcare professionals in it, this seminar reviews the reasoning and criteria for opioid dose reduction and discontinuation, teaching techniques to encourage patient buy-in while overcoming fear and resistance.

- Discuss the history of the opioid crisis in the United States.
- Demonstrate an understanding of how to use opioids chronically.
- Discuss common signs of opioid use disorder (OUD).
- Describe what to do when you diagnose OUD.

**10) Opioids II—Strategies for Reducing the Burden: Diagnosis, Treatment, Tapering, and Documentation for Acute and Chronic Opioids and Benzodiazepine****1 CME credit**

This seminar examines the scope of the opioid problem and best practices for how to effectively use the guidance of the CDC, FDA, and medical boards. Based on these resources, we describe practical approaches to practice more safely with opioids.

- Demonstrate an understanding of how to access and utilize CDC recommendations for clinicians providing pain care, including those prescribing opioids.
- Discuss the history of the opioid crisis in the United States.
- Articulate measures to individualize pain management for a specific patient's pain type and anticipated duration.
- Discuss common signs of opioid use disorder (OUD).

**11) Opioid Prescribing for Surgeons****1 CME credit**

This seminar examines the scope of the opioid problem in procedural and surgical specialties and uses the guidance of the CDC, FDA, medical boards, and other best practices to describe practical approaches to practice more safely with opioids.

- Learn about the extent of the opioid epidemic nationally and locally.
- Identify areas of risk for patients as a result of current prescribing practices.
- Review strategies to mitigate the risks in prescribing opioids.

**12) Creating a Safer Office Practice: Preventing Errors in the Office Setting**

This seminar examines common errors in the ambulatory medical setting in tandem with practical considerations and solutions for providers and their staff to reduce those errors.

- Describe the many ways that errors originate, including research on human factors.
- Demonstrate multiple examples of how errors are generated.
- Examine the concepts of propagation, failure to recognize, and failure to rescue.
- Discuss practical solutions to reduce errors, including the value of systems and communication.

**13) 6 Tips for Improving Communication: Case Studies for Physicians, APPs, Risk Managers, and Office Staff**

In this presentation, we explore the importance of communication through an interactive approach that uses videos and role playing. The goal is to identify and review techniques that improve communication in patient care.

- Define what the components of a successful patient interaction are.
- Recognize nonverbal cues in patient interactions.
- Develop methods for effective communication.

**14) Diagnostic Errors and How to Reduce Them****1 CME credit**

Diagnostic errors are most common in the cognitive aspects of patient care. This seminar examines the different root causes of biases and describes practical suggestion to improve your diagnostic process.

- Discuss the importance of diagnostic errors.
- Demonstrate examples of diagnostic errors.
- Develop a skill set to decrease diagnostic errors.

**15) All Clear: Ensuring Your Patient Is Ready for Surgery**

This seminar examines the specific risk issues in evaluating your patient for surgical procedures. We explore the concept of optimal management and the considerations to get there, and why these are preferable to a binary "clear or not clear" opinion. Case studies are used to show the difference between these two approaches.

- Identify areas of risk associated with the preoperative clearance process.
- Incorporate these areas of risk into the assessment and clearance process.
- Review communication strategies with other providers and the patient to mitigate the risks.

**16) AI: The Double-Edged Scalpel****1 CME credit**

Clinical, social, and administrative applications empowered by artificial intelligence, particularly those using generative language models (like ChatGPT), are being increasingly marketed to and adopted in medical practices and health facilities. These augment other AI-empowered applications for clinical decision support, communications, image processing, document handling, etc. Copic's risk managers and legal department have identified technological mechanisms, existing legal principles, and potential new hazards that can foreseeably become important in preventing adverse events and defending liability claims related to AI.

- Understand some basic principles and applications of AI and machine learning and how these differ from traditional computer programs.
- Identify error pathways and concerns about using AI for medical tasks, such as communication, documentation, and decision support.
- Evaluate trends and implications of AI for patient safety, professional liability, and regulatory policy, including currently unresolved questions about how legal theories of professional liability apply to AI-enabled applications.

**17) Sepsis: Fear and Loathing in the Microbial World****1 CME credit**

An analysis of infections and their complications, including sepsis, that lead to lawsuits through the lens of Copic's experience.

- Understand the importance of the whole healthcare team for best management of patients with infectious symptoms.
- Recognize the importance of vital signs in the diagnostic evaluation of patients who might be septic.
- Understand that the initial presentation of infections that can rapidly progress may be subtle and non-specific.
- Learn from cases of severe infections how early recognition and treatment might have resulted in better patient outcomes.

**18) Documentation That Matters****1 CME credit**

Clinical documentation can be important for clinical quality of care, communication among providers, communication with patients, billing purposes, and for defense of your care should adverse outcomes or allegations arise. In this activity, we focus on what are the critical elements of documentation, and what are the critical situations in which the documentation really "matters." Templates, voice transcription, scribing and remote scribing and AI are also issues for which best practices will be discussed.

- Anticipate when more thorough documentation and direct communication with other providers may reduce adverse outcomes.
- Articulate major patient safety and lawsuit risk areas that are affected by quality of documentation.
- Discuss how much documentation is enough for a given clinical encounter.
- Describe clinical situations where documentation may enhance physician-patient shared decision making to improve patient safety.

**19) Strategies for the Non-compliant Patient Difficult Conversations, Informed Refusal, and Terminating the Relationship****1 CME credit**

Clinical practice depends on good physician patient communication, trust and understanding. Unfortunately, there are times when this is challenged. This activity examines the spectrum of patients from the non or poorly compliant patient, to the difficult, untrusting or poorly behaved patient, all the way to the threatening patient or family member. Strategies that match the spectrum are framed in a practical matter, and tools such as closed loop communication, informed refusal and termination of the relationship are shared.

- Compare and contrast the strategies for noncompliant, abusive or difficult patients
- Describe the necessary elements to terminate a physician (provider)/ patient relationship
- Describe the necessary elements of a defensible informed refusal
- Identify the high-risk scenarios by specialty or service line

**20) Trends in Malpractice Claims and Patient Safety for Your Practice Setting****1 CME credit**

A look at the areas where we see the most frequent malpractice cases as well as areas we are starting to see an increase in lawsuits—and, how to protect yourself!

- Recognize areas of recurring patient safety issues and how to correct them.
- Provide an overview of quality, patient safety and clinical effectiveness.
- Explain the process to report adverse events.

**21) Recurring Issues That May Get You Sued: Keeping Your Patients Safe****1 CME credit**

A review of areas where Copic most frequently sees medical liability cases as well as a summary of ways to reduce your risk exposure and improve patient safety in these areas. Using real claims examples, this seminar reviews the elements of a medical malpractice case, the course of a claim from occurrence to closure, and what are the most common issues and clinical conditions that lead to malpractice concerns. List the 4 elements that a plaintiff attorney must prove in a medical liability case.

- Articulate areas that are higher risk for patient safety and recommend strategies to reduce this risk.
- Recognize when you are in a situation that warrants heightened vigilance.
- Explain how techniques such as communication, teamwork and electronic tools can improve patient safety
- Demonstrate when you should call to report, what to report, and what to expect following the report