



THE CASE COMPASS

ELEVATING STANDARDS, ONE ISSUE AT A TIME

5th Edition - July 2026

Building on 25 Years of Excellence for CMSA Sacramento Chapter: A Message from Our New President Anupama Shojaei



Dear CMSA Sacramento
Members,

Happy Summer!

It is both an honor and a privilege to introduce myself as the new President of the CMSA Sacramento Chapter. I have enjoyed serving alongside our dedicated Board of Directors, and I am excited to continue working with this incredible team as we support, educate, and connect case managers throughout our region. As I step into this role, I want to begin by celebrating our chapter and the remarkable accomplishments we achieved at the CMSA National Conference. This year marked a very special milestone as CMSA Sacramento celebrated 25 years as a chapter. For a quarter century, our chapter has brought together case management professionals committed to improving patient outcomes, advancing our profession, and supporting one another. It is an achievement we can all be proud

of. Our chapter was recognized nationally with the Award of Excellence for Publishing & Promotion. This award reflects the hard work of many volunteers, and I would like to extend a special thank you to Monika Goins, BA, RCFE, CMDCP for the countless hours she invests in writing, editing, and producing our newsletters. Her dedication has helped create a publication that informs, inspires, and keeps our members connected.

Another heartfelt thank you goes to Debi Moroles, whose energy and commitment keep so many of our chapter activities running smoothly. From securing outstanding speakers and sponsors to leading committees and highlighting exceptional case managers for us to write about in each newsletter, Debi's contributions make a tremendous difference.

We also have exciting individual achievements to celebrate. Congratulations to Susane Hao, RN, MSN, CLCP, and Nannette Green, MHS, BHS, RN, CCM, on their election to the 2026–2027 CMSA National Board of Directors. We are proud to see Sacramento represented at the national level by such accomplished leaders.

Congratulations as well to Paul Borja, RN, PHN, DHA, DNP, EdD,

DBA, PhD, CCM, ACM, CMAC, CNML, CMGT-BC, CMCN, CDONA, FAACM, FACDONA, FSIEN, FADLN, on being inducted as a CMSA Fellow, Class of 2026, a well-deserved recognition of his outstanding leadership and contributions to the field of case management.

As we look ahead, our Board of Directors gathered for our annual planning retreat on July 14 to map out the remainder of the year. While many of the Board's efforts happen behind the scenes, every educational program, networking event, newsletter, sponsorship, and member resource is the result of dedicated volunteers working together with one goal: creating value for our members. To each of our board members, thank you. Your time, passion, and commitment are what make this chapter successful.

Please save the date for our Annual Case Management Expo on Wednesday, October 14, at the Kimpton Sawyer Hotel in Sacramento. This is one of our signature events each year, and we hope you'll join us for an evening of education, networking, and reconnecting with colleagues from across our region.

Our next chapter meeting will be





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held virtually on Tuesday, August 19 via Zoom. We heard your feedback following our last virtual meeting, where several members experienced challenges accessing the session after registering. We appreciate everyone who shared their experience, and we're making changes to simplify the registration process and make joining future virtual meetings much easier.

As I begin this journey as your President, I want to thank each

of you for your membership, your dedication to the profession, and the work you do every day on behalf of patients, families, and communities. I am excited about the year ahead and look forward to meeting many of you in person at our Expo this October. Until then, I hope you enjoy a wonderful, restful, and safe summer!

Warmly,

Anupama Shojaei, CSA®, CPRS™,
CDP
President CMSA Sacramento
Chapter





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Board of Directors

President: Anupama Shojaei - CarePatrol of Rancho Cordova
VP/President Elect: TBD
Immediate Past President: Paul Borja - Sutter Medical Center Sacramento
Director at Large: Susane Hao - RNS HealthCare Consultants, Inc.
Treasurer: Arleen Barker - Sutter Health
Secretary: Theresa Hernandez, CCM
Administrative Assistant: Kelley Blackwell
Director: Ruby Wilson - Retired VA
Director: Debi Moroles- Cypress Healthcare Group
Director: Teresa Capina - Kaiser
Director: Rebecca Boyd Anderson - Samuel Merritt University
Director: Monika Goins - Absolute Compassion Hospice
Director: Erin Weitzenberg - Explore Senior Culture
Director: Daniel Larkins- BrightStar Care of Roseville/Sacramento
Director: Jen Lee - Purple Door Finders

Committee Members

Committee Chair: Debi Moroles - Cypress Healthcare Group
Committee/Newsletter Editor, Social Media: Monika Goins - Absolute Compassion Hospice
Committee/Website: Cynthia Newton - Interim Healthcare
Committee/ Membership Ambassador: Johannah Maggetti - Dignity Health





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New Members

Jennifer Li RN,MSN,ACM- Stanford Health Care
Gloria Frederick MSN- Providence -SRMH
Ally Rybchenko- Valley View Healthcare
Lily Rose Batayola ACM-RN- Kaiser Permanente
Matt de Ryk - A Place for Mom
Diana Evans Harris DNP,RN,PHN,CMGT-BC
Angel Aguilar RN-BSN- North Valley Specialty Group
Hasmik Movsisyan RN- A2Z PHARMACY INC
Margit Spencer- Cornerstone Caregiving
Sannie Lee- Family Matters In-Home Care
Alexandria Ruisenor MSW- Sutter Health
Carleen Gonzalez-Perez- Sutter Health - Sutter Care at Home
Bonnie Kellogg RN- Genex Mitchell Enlyte
Paul Terpeluk - FirstLight Home Care
Michael Bankas- VITAS HEALTHCARE
Zouberou Sayibou BS- Lumane Health Inc.
Darlene Gulino - IOA at Home
Tiffany Tomlinson BSN- Kaiser

Renewed Members

Stasia Andrew RN,BSN,PHN,CCM- Kaiser Permanente
Trina Clark MSN,RN,CCM
Arleen Barker ACM-RN,MPA- Sutter Health
Dot Boyd
Nannette Green MSHA,BSHA,RN,CCM
Shannon Maguire Estrada BSN,PHN,CCM
Maria Sabio MSN
Kim Dee LCSW
Lou Basinal MSN- Age In Place Sacramento
Laura Gilbeau BS
John Crystalinas BS- Alphaone Ambulance
Patricia Gilbert CCM,RN
Mai Vang - The Oaks Senior Living
Tierrah Camara - Gold Country Health Center
Daniel Larkins ASN,RN-BSN
Rangi Paula Giner BSN,LPN- Absolute Compassion Hospice

Celebrating 25 Years CMSA Sacramento Board And Committee Members Welcomes our New & Existing Members

As CMSA Sacramento proudly celebrates 25 years of serving case management professionals, a milestone recognized at this year's CMSA National Conference, we extend our heartfelt gratitude to both our new members for joining and our returning members for renewing your commitment. Your membership is more than belonging to an organization; it is a connection to a vibrant community dedicated to professional growth, education, collaboration, inspiration, and support. We are excited to welcome you and look forward to seeing you at our upcoming educational and networking events. As we work toward our goal of doubling our membership in 2026, we invite you to share the value of CMSA Sacramento by bringing a colleague or friend to experience the meaningful connections and opportunities that have made our chapter thrive for the past 25 years.

— CMSA Sacramento Board & Committee Members





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The Case Compass Resource Hub: Guiding You to Valuable Resources

- For Essential public service like **cash aid**, **CalFresh** food assistance, or **Medi-Cal**, use the **Department of Human Assistance portal**. <https://ha.saccounty.gov>
- **California Aging & Disability Resource Connection ADRC of Sacramento** <https://www.adrc4.org>
- **Veterans Crisis Line** - (800)273-8255 (press 1) or text 838255
- **Homeless Veterans Hotline** (877)424-3838
- **Agency On Aging Area 4** (800)211-4545 / agencyonaging4.org
- **County - Level Client Services: Sac County Aging Resources** sacagingresources.org
- **A Community of Caring (ACC)- Bridge to Healthy Families** accsv.org
- **California Department of Aging** <https://aging.ca.gov>
- **Assisted Living Waiver Program-** <https://www.dhcs.ca.gov>
- **InnovAge** - <https://www.innovage.com> (888)902-3022
- **WEAVE** - Offers help to victims of domestic violence (916)920-2952 <http://www.weaveinc.org>
- **Alta Regional-** Offers mental health & disability services for the young. (916)978-6400 <http://www.altaregional.org/>
- **People Reaching Out** - A non-profit organization specializing in substance abuse and violence prevention (916)576-3300 (Sacramento) ; (530)666-7621 (Woodland) <http://www.peoplereachingout.org>
- **La Familia Counseling Center** - Offers free short term & long term counseling, career advise, and training, tutoring, education and employment for youth and family resources for all ethnicities. (916)452-3601 <http://lafcccom/>
- **Centro Guadalupe: Catholic Charities of Sacramento** - (916)443- 5367
- **Imani Clinic-** Free clinic serving uninsured populations. Offer Free-Meds Programs, translating services, and patient referrals to specialists for little to no cost. Open Sat. only 8AM-1 PM. 3415 Martin Luther King Blvd. Sacramento, CA 95817 (916)475-9582 <http://www.imaniclinic.org/>
- **Planned Parenthood** (916)444-7966; (916)446-6921; (916)452-7305 <http://www.plannedparenthood.org/>
- **Food Bank of Yolo County** (530)668-0690 www.foodbank.org
- **Del Oro Caregiver Resource Center-** <https://www.deloro.org> (916)728-9333
- **El Hogar - Sierra Elder Wellness Program** - Specialized outpatient mental health services to older adults. Comprehensive geriatric assessments, individual groups therapy, case management, psychiatric medication & follow up, housing support. (916)363-1553
- **Sacramento County Resources** - (916)263-3800 www.seta.net
- **Master Care/Cal AIM-** (855)836-6355 Cal AIM alaim.dhcs.ca.gov



Dates to Remember

August 1, 2026

World Lung Cancer Day & National Minority Donor Awareness Day

August 18, 2026

World Breast Cancer Research Day

August 19, 2026

CMSA Free Virtual Event 5-6:30 PM 1 Contact Hour. Presented by Mark Brownstein, Certified Senior Advisor & Respected Medicare Expert. Topic: What Case Managers need to know about Medicare, healthcare costs, and coverage charges. Register sacramentocmsa.org

August 19, 2026

World Humanitarian Day

August 21, 2026

National Senior Citizen Day

September 1-7, 2026

National Clinical Nurse Specialist Recognition

September 6-12, 2026

National Suicide Prevention Week

September 13-19, 2026

National Assisted Living Week

September 18, 2026

National HIV/AIDS and Aging Awareness Day

September 20-26, 2026

National Rehabilitation Week

September 22, 2026

Falls Prevention Awareness Day

September 25, 2026

World Lung Day

September 30, 2026

National Women's Health Day

October 10, 2026

World Mental Health Day

October 11-17, 2026

National Case Management Week

October 14, 2026

CMSA Sacramento Expo at The Sawyer 500 J Street- More info to come.



<https://sacramentocmsa.org>



P.O. Box 6304 Folsom, CA 95763



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Bringing Back Best Practices: What I Learned at the CMSA Annual Conference By Arleen Barker, MPA, RN, ACM



This was the fourth National CMSA Annual Conference that I have attended, and I can honestly say I'm an education junkie. After 35 years of case management experience in a variety of positions across the care continuum, this seasoned professional has learned that you truly can teach an old dog new tricks. The wide variety of educational topics is both engaging and inspiring. I always come away with valuable knowledge nuggets from each session that I can incorporate into my work. Learning alongside nurse and social work case managers from across the country broadens my perspective on our evolving profession, and we have a lot of fun along the way.



From registration (and my annual tradition of picking up the latest edition of the **Standards of Practice for Case Management** from the CMSA Store), there is a sense of excitement with every experience. Meeting vendors, discovering innovative care delivery models, learning about artificial intelligence and current legislation, and attending sessions outside of my everyday role all contribute to professional growth. The opportunities to enhance your practice are endless. Not a moment is wasted, and each year the conference venue is first-class.

This organization truly showcases the very best our profession has to offer. My top three highlights were:

- The Awards Ceremony, where I was proud to celebrate our chapter's accomplishments.
- The no-nonsense communication session, "**Less Drama, More CARE: Culture, Access, Respect, and Equity.**"
- The networking opportunities with case management professionals from across the country.

Each time I attend the CMSA Annual Conference, I return to work feeling more knowledgeable, energized, and inspired. If you ever have the opportunity to attend, I highly recommend it—you will not be disappointed. I hope to see many of you at the **2027 CMSA Annual Conference & Expo in Orlando!**





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Connecting, Learning, Leading: A Nurse Case Manager's Experience at the CMSA Annual Conference By *Susane Hao, MSN, RN, CCM, CLCP, CMSA Sacramento Director at Large, CMSA National Board Director*



What was it like to attend: Attending the CMSA Annual Conference is a wonderful way for me to immerse myself in a broad range of continuing education and innovative practices specific to case management.

Days of events: During June 16th, Pre-Conference sessions workshops included Chapter Leader Workshop, Resume Writing for Case Managers, presented by *Marianne DiMola*, Behavioral Health Workshop, presented by *Ellen Fink-Samnick*, Writer's Workshop by the Editorial Board of CMSA Today, presented by *Colleen Morley* and *Tiffany Fergusson*, Innovation Workshop, presented by *Rhonda Manns*, and First-Time Attendee Networking event.

During June 18th to June 19th, concurrent sessions were held for different tracks of case management. There is also an Expo Hall with many exhibitor booths offering information about resources and services for case managers and health systems. Poster presentations are also held in the Expo Hall at selected days and times.



June 17th: CMSA Annual Meeting took place, which includes the Chapter Excellence and Innovation Awards. There were 11 winners and nominees for different categories, and **Sacramento CMSA won the Chapter Excellence Award and Innovation Award for Publishing and Promotion** for our newsletter called, The Case Compass. This was our first award as a Chapter. I was so proud of our board member *Monika Goins*, who created our newsletter and leads the process for each publication. Her passion, creativity, vision, dedication, and how she has engaged our board, committee, and community, make the newsletter the amazing publication it has become. CMSA Sacramento's newsletter has become a way for local case managers to educate the community about various topics, bring visibility to the case manager role through interviews, and keep our community informed about our local chapter. Sacramento Chapter was also **recognized for 25 years of dedicated service** to advance case management practice through advocacy, leadership, and education. This recognition made me realize how important it is to continue CMSA Sacramento's legacy for future case managers' growth and development in their profession.



Speaker sessions, takeaways: I can share some examples of session topics at the conference that took place from June 17th to June 19th. This year, as an incoming National Board Director, I had the opportunity to introduce amazing speakers. On June 17th, *Sharyn King* and *Ruja Luitel* presented "Managing the Margins: Case Management in Mixed-Status Immigrant Families." Later that day, *Marcia Washington* and *Regan Briesinger* presented their session, "REACH: Reducing Readmissions by Addressing SDOH Needs





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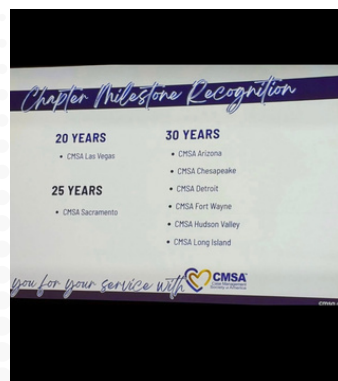
Connecting, Learning, Leading: A Nurse Case Manager's Experience at the CMSA Annual Conference By Susane Hao, MSN, RN, CCM, CLCP, CMSA Sacramento Director at Large, CMSA National Board Director

Post-Discharge." On June 18th, *Molly Minnick* presented, "Caring for the Caregiver: Integrating Employer-Based Case Management." I also had the opportunity to moderate Roundtables Discussions on 2 different days. On June 17th, I facilitated the topic of "Home Care" with *Tina Lipscomb*. Our group of 9 included case managers from acute care hospitals, community rehabilitation settings, and the Indian Health Service. We discussed how case managers collaborate with home health and home care teams to deliver the case management process. On June 18th, I co-lead a round table discussion with *Stefany Almaden* for the topic "Patient Advocacy, Engagement, and Cultural Responsiveness." We examined how case managers can empower and advocate diverse populations through engagement strategies and culturally responsive care. We discussed barriers and possible solutions.

I really enjoyed the Round Tables discussions because we were in small groups, and everyone had a chance to talk about their unique experience and insights. It was an opportunity to inform and learn from different case managers in different settings and systems.

A new concept I took away was from a workshop presented by one of the Keynote Speakers, Rhonda Manns, called "Shared Stories, New Ideas: Empathy Mapping to Build Insight, Compassion and Change in Case Management," where we learned about Empathy Mapping, an innovative way to approach problem-solving in our profession.

Importance of attending and what I gained professionally: I value the connections with case managers from across the country and even different continents, as their diverse perspectives broaden my understanding of issues impacting case management and healthcare. I also value the connections with chapter leaders from across the country; I've gained so much insight, knowledge, and inspiration to support the mission of CMSA. It is also amazing to meet with community partners and learn about how their services are evolving to meet the needs of healthcare and patients. I have the tools and ideas I need to support my practice as a board-certified nurse case manager, Certified Life Care Planner, CMSA Sacramento director at large, and CMSA national board director.





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AN EVENING OF PURPOSE AND PARTNERSHIP: CMSA SACRAMENTO BRINGS HEALTHCARE PROFESSIONALS TOGETHER. HOSTED BY ACC MAPLE TREE VILLAGE



What an incredible evening of education, collaboration, and meaningful networking with our healthcare community! The CMSA Sacramento Chapter was proud to bring together case managers, physicians, social workers, healthcare leaders, and community partners for an inspiring discussion led by Dr. Maninder Khalsa from Sutter PACE on the important topic of **Goals of Care**. These conversations are vital as we continue working together to improve patient outcomes and support quality transitions of care throughout our community.



A heartfelt thank you to our beautiful host venue, **ACC Maple Tree Village**, for providing such a welcoming space for connection and learning. They are a non-profit senior living and memory care. If you are seeking these type of service contact them at (916)395-7579.

We would also like to recognize and thank our incredible sponsors and community partners:

CarePatrol of Rancho Cordova- CarePatrol provides senior care options based on care needs and quality of life for seniors. They can be reached at (916)426-2824.

Suncrest Hospice - Suncrest provides hospice, home health, and palliative services and can be reached at (916)928-0102.

North Valley Specialty Group - Mobile wound care servicing skilled nursing, assisted living, and patient homes. They can be reached at (833)451-5565.

CMSA Sacramento remains committed to creating opportunities that strengthen collaboration, empower healthcare professionals, and ultimately support the very best care for our community. Anyone interested in hosting an event or sponsoring with a table, please reach out to CMSA Sacramento Board of Directors.

~ Debi Moroles and Monika Goins



--- Happy Summer---





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The Heart of Hospice Care: Inside the Mind of a Social Worker

By Abraham D. Samuel Jr., BS, MSW, Hospice Social Worker,
Absolute Compassion Hospice & Rx Home Health



Abraham D. Samuel Jr., BS, MSW Hospice Social Worker | Absolute Compassion Hospice & Rx Home Health

My passion for serving others has been shaped by both my education and my professional journey. I earned my Bachelor of Science degree from Iona College and my Master of Social Work from Clark Atlanta University. I am also a proud member of Omega Psi Phi Fraternity, Inc., an organization founded on the principles of Manhood, Scholarship, Perseverance, and Uplift, values that continue to influence both my personal and professional life.

For more than 11 years, I have had the privilege of serving patients and families as a hospice social worker. My journey into hospice began in home health, where I quickly realized that families facing end-of-life care needed more than medical support, they needed someone to guide them emotionally, connect them with resources, and help them navigate one of life's most difficult transitions.

As hospice social workers, we often become the bridge between patients, families, and the interdisciplinary care team. While many people associate hospice primarily with medical care, social workers play a vital role in addressing the emotional, psychosocial, and practical needs that accompany serious illness.

More Than Emotional Support

A large part of my role is helping families prepare for what lies ahead. This includes providing emotional support, helping them understand anticipatory grief, connecting them with community resources, strengthening caregiving plans, and continuing bereavement support even after a loved one has passed.

Every family experience this journey differently. Some struggle with difficult family dynamics, while others need help coping with overwhelming emotions or making complex decisions. My role is to meet each family where they are, listen first, and provide support that is individualized to their unique situation.

Case management naturally overlaps with social work in hospice. From the moment a patient enters hospice, we continually assess changing needs, coordinate resources, maintain regular communication, and advocate for both patients and caregivers throughout their hospice journey.

Advocacy Through Compassion

Advocacy means ensuring every patient is treated as an individual whose wishes matter. Whether a patient is receiving care at home, in an assisted living community, or another care setting, my responsibility is to help ensure their voice remains central to every decision.

Building trust begins with the very first meeting. I believe in learning each person's name, respecting their time, and allowing patients and families to guide conversations based on where they are

emotionally. Genuine relationships cannot be rushed.

One experience that continues to remind me why this work matters involved a family member who reached out more than a year after their loved one had passed. They shared how meaningful our support had been during their grieving process. Together, we recognized signs of depression and connected them with additional one-on-one and group support. Moments like these remind me that hospice care extends well beyond the final days of life.

The Power of Teamwork

Hospice is truly a team effort. Nurses, physicians, hospice aides, chaplains, social workers, and other clinicians bring unique expertise to support the patient and family. Successful hospice care depends on communication. Through regular interdisciplinary team meetings and ongoing collaboration, we ensure every aspect of a patient's physical, emotional, spiritual, and psychosocial needs is addressed. Our shared goal is simple: providing comfort, dignity, and compassionate support throughout the end-of-life journey.

Honoring Every Patient's Wishes

Every patient deserves care that reflects their values, beliefs, culture, and personal wishes. Cultural and religious preferences should be recognized from the beginning of hospice care and respected throughout the patient's journey, including memorial and funeral traditions.

Perhaps one of the most important responsibilities we have as social workers is helping families honor their loved one's final wishes. Hospice is never about what we want





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The Heart of Hospice Care: Inside the Mind of a Social Worker

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Absolute Compassion Hospice & Rx Home Health

or even what the family wants, it is about respecting the patient's choices and preserving their dignity.

Challenges and Rewards

One of the greatest challenges we face is seeing families wait too long before choosing hospice. Delayed referrals often mean there is less time to build meaningful relationships, establish support systems, and prepare emotionally for the loss ahead.

Yet despite these challenges, the rewards are immeasurable. Listening to families share memories, witnessing reconciliation, providing comfort during incredibly difficult moments, and helping people feel supported are experiences that continue to inspire me every day.

Working in hospice has also changed my own perspective on life. It reminds me that every life eventually reaches its final chapter, making it even more important to value relationships, reflect on meaningful moments, and appreciate the present.

Advice for Future Social Workers

For anyone considering a career in hospice social work or case management, my advice is simple: meet families where they are. Come prepared with knowledge, compassion, and resources. Build relationships before difficult conversations arise. Be familiar with services such as Medicare, Veterans benefits, IHSS, advance directives, POLST forms, caregiver resources, mortuary planning, grief support groups, and placement options. The more prepared you are, the better you can serve patients and families.

I also want our community to understand that hospice social workers are an essential part of the interdisciplinary team. Managing emotional and psychosocial needs is

every bit as important as managing pain, anxiety, or other physical symptoms. We help patients and families navigate one of life's most personal journeys with dignity, compassion, and hope.

If I had to describe the heart of hospice social work in one sentence, it would be this:

You have to care, keep an open mind, and remember that every person and every family is unique.

As social workers, we are privileged to walk alongside patients and families during one of life's most meaningful moments. Through emotional support, advocacy, education, and connection to community resources, we help ensure no one faces the end-of-life journey alone.

By Abraham D. Samuel Jr.
Co-Writer and Editor Monika Goins





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Where Compassion Meets Advocacy

The Heart of Case Management with Tricia Gilbert, RNCM



Tricia Gilbert, RNCM | InnovAge

A Journey into Case Management; A Career Inspired by the Power of Making a Difference

Tricia Gilbert, RNCM, is a dedicated case management professional at InnovAge whose career has been guided by compassion, advocacy, and a commitment to making a difference in the lives of older adults. Tricia attended New York Regents and earned her Associate of Arts (AA) and Associate of Science (AS) degrees. Her journey into case management began while working as an authorization nurse, where she was inspired by case managers who spoke about how rewarding it was to make a meaningful difference in their patients' lives. Encouraged by mentors Jayne Mullen and Brenda Schmiegel, Tricia pursued her goal of becoming a case manager and proudly earned her Certified Case Manager (CCM) credential.

The Many Layers of a Case Manager's Role

Tricia's days at InnovAge begin with morning interdisciplinary team (IDT) meetings, followed by

collaboration with hospital case managers and addressing the many needs that arise throughout the day. She believes an exceptional case manager must have patience, the ability to multitask, think outside the box, anticipate potential challenges, and explore multiple avenues to find solutions.

One of the biggest challenges she encounters is resource availability in the Sacramento area. Yet, for Tricia, case management is about much more than coordinating services. "Patients aren't just a number," she shares. Even when she may not meet a participant face-to-face, multiple admissions and ongoing interactions allow her to understand their struggles and build meaningful relationships. Her approach is simple: be consistent, be available, and always advocate for the person behind the patient.

When Participants of InnovAge Become Family

When asked, Tricia shared that one of her most memorable experiences involved a participant who initially used a wheelchair but, through his dedication to physical therapy, eventually progressed to using a walker. Tricia made a point of stopping to chat with him whenever she saw him. One day, he stood up to greet her and offered her a hug. Because he had no local family, Tricia felt that their relationship had grown into something much deeper, they had become family.

Although the participant has since passed away, Tricia says he will

always have a special place in her heart. Experiences like this remind her of why she chose case management. Many participants may not have family nearby, and healthcare professionals can become an important part of their support system.

Meeting People Where They Are

Working with the diverse population served by InnovAge has also changed Tricia's perspective on aging and healthcare. She has worked with participants from many different backgrounds and life experiences, including individuals who have experienced homelessness, substance use, or incarceration. These experiences have reinforced an important lesson: healthcare professionals must meet people where they are without judgment.

Tricia believes that every person deserves access to quality healthcare, compassion, dignity, and respect, regardless of their circumstances or past. She has also learned that there is rarely one solution that works for every participant. What may seem like an easy solution to a healthcare professional may feel impossible to a participant facing complex social or personal challenges. This perspective has helped Tricia become more comfortable thinking outside the box, communicating with professionals, and approaching each participant's needs with patience and understanding.





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Where Compassion Meets Advocacy

The Heart of Case Management with Tricia Gilbert, RNCM

The Power of Interdisciplinary Collaboration

Collaboration is at the heart of Tricia's work. Through daily IDT meetings, the care team discusses participants who may have new concerns or needs that require attention. This team-based approach allows professionals from different disciplines to bring their unique perspectives together to develop comprehensive, person-centered solutions.

Tricia's experience at InnovAge has strengthened her ability to collaborate, communicate with groups of professionals, and approach complex situations with flexibility. She recognizes that effective case management requires a willingness to consider multiple options and understand that each participant's circumstances are different.

A Culture Built on Community and Connection

Tricia describes InnovAge's culture in three words: **accepting, kind, and family**. She appreciates the organization's unique environment, where participants have access to a variety of services and resources, including healthcare, rehabilitation, meals, activities, and other support services, all within a connected community. She also values the opportunities for teamwork and continued learning through IDT meetings, employee engagement activities, and educational opportunities provided by members of the team.

For Tricia, InnovAge is more than a healthcare organization; it is a community where relationships can grow, and participants and employees can become part of something that feels like family.

A Message for the Next Generation of Case Managers

Looking toward the future, Tricia hopes to finish her career at InnovAge. Her advice to healthcare professionals considering a career in case management or working with older adults is simple: **"It will be the most rewarding job you'll ever have."**

For those who consider a career in case management, Tricia's journey demonstrates the impact that advocacy, persistence, collaboration, and compassion can have on the lives of others. Above all, she hopes her participants remember that she always fought for their best interests, cared deeply about their needs, and worked to be the voice for those who could not speak for themselves.

Her story is a powerful reminder to all healthcare professionals that case management is not simply about coordinating care. It is about seeing the person behind the patient, building trust, creating meaningful connections, and ensuring that every individual receives the dignity, compassion, and support they deserve.

~Monika Goins





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Special Awards & Recognition

Leadership. Legacy. Fellowship.

Celebrating Excellence: CMSA Sacramento's Immediate Past President Paul Borja Honored as a CMSA Fellow



CMSA Sacramento proudly celebrates our Immediate Past President, Paul Borja, RN, PHN, DHA, DNP, EdD, DBA, PhD, CCM, ACM, CMAC, CNML, CMGT-BC, CMCN, CDONA, FAACM, FACDONA, FSIEN, FADLN, on his induction as a CMSA Fellow, Class of 2026, at the CMSA National Conference. This prestigious recognition is a well-deserved honor celebrating Paul's outstanding leadership, dedication, and significant contributions to the field of case management.

During his time as President of CMSA Sacramento, Paul was instrumental in helping align the chapter's goals with its mission of supporting, educating, and empowering case managers. His leadership and commitment have made a lasting impact on our chapter and the professionals we serve. For CMSA Sacramento, hearing of Paul's induction as a CMSA Fellow was not only a proud moment for Paul but also a tremendous honor for our

entire chapter.

Paul's accomplishments and dedication serve as an inspiration to case managers everywhere. His commitment to professional excellence demonstrates what is possible when passion, leadership, education, and service come together. CMSA Sacramento congratulates Paul on this remarkable achievement and is proud to celebrate his continued contributions to the case management profession. His journey serves as an inspiration and encouragement to the next generation of case managers who will follow in his footsteps.

~ Monika Goins

