

COMMUNITY CARE TEAM CASE CONFERENCE AGENDA

DATE / TIME / LOCATION

AGENDA*

<p>12:00pm</p>	<p>Introductions & Lunch</p> <ul style="list-style-type: none"> ● Overview of conference goals & agreements (2 min) <ul style="list-style-type: none"> ○ Confirm ROI ● Intros: Name, organization, role (5 min) 	<p>Facilitator</p>
<p>12:10pm</p>	<p>Case Review & Action Planning</p> <p>Student A 12:10 - 12:45 pm Student B 12:45 - 1:25 pm</p> <ul style="list-style-type: none"> ● Listen to caregiver’s hopes (audio recording) (3 min) ● Clinic overview (3 min) <ul style="list-style-type: none"> ○ SOAP note - ID, chief complaint, pertinent medical-family-development history ○ Assessment and plan - referrals, therapies, imaging, labs ● School overview (3 min) <ul style="list-style-type: none"> ○ Date and brief summary of last IEP and triannual assessment, therapies & services being provided, healthcare plan, significant health screening results, attendance, type of interactions and behaviors in classroom and with peers ● Questions (10 min) ● Action items: What is needed? What are your commitments, requests and suggestions? (15 min) <ul style="list-style-type: none"> ○ List action items and delegate who will be responsible for them ○ Determine if the school and/or clinic will have a follow-up meeting with parents and who will initiate ○ Document all action plans and follow-up in clinic/school tracking sheets 	<p>Facilitator</p> <p>Clinic Provider</p> <p>School Point-Person</p>
<p>1:25pm</p>	<p>Closing</p> <ul style="list-style-type: none"> ● 1-word checkout (time permitting) ● Participant questionnaire completed 	<p>Facilitator</p>

**Note that this is a 2-case agenda. Modify depending on the complexity of the case(s) and time available.*

Pre-Conference Preparation

- Clinic & school ROIs signed by parents/caregivers (bring copies to the conference) - Satu
- The provider gets an audio recording of parents/caregivers (edited as needed) - Satu
 - What do you love about your child? What are their strengths? What are your concerns? How are things at home? What are your hopes & dreams for your child?
- Clinic case history and overview prepared - Satu
 - SOAP note - ID, chief complaint, pertinent medical-family-development history
 - Assessment and plan - referrals, therapies, imaging, labs
- School case history and overview prepared - Shar
 - Date and a brief summary of last IEP and triannual assessment, therapies & services being provided, healthcare plan, significant health screening results, attendance, type of interactions and behaviors in classroom and with peers
- Appropriate school/clinic staff invited to the conference (subs provided as needed) - Shar/Brenda
- Meeting room reserved at the school site - Shar
- Lunch ordered - Brenda
- Revise conference agenda as needed - Dena/Satu/Brenda
- Bring copies of the agenda (revised as needed), participant questionnaires (below), [photo release forms](#), and [sign-in sheet](#) - Brenda
- Send reminder - Brenda

Post-Conference Follow-Up

- Share action notes with conference participants (no identifying info), including who is following up with family - Brenda

Post-Conference Action items & Notes

Student A:

Clinic Commitments (Key clinic contact & email/phone)

- Action Item 1
- Action Item 2
- Etc.

School Commitments (Key school contact & email/phone)

- Action Item 1
- Action Item 2
- Etc.

Other takeaways:

- Lessons learned, future discussion topics, etc.

Student B:

Clinic Commitments (Key clinic contact & email/phone)

- Action Item 1
- Action Item 2
- Etc.

School Commitments (Key school contact & email/phone)

- Action Item 1
- Action Item 2
- Etc.

Other takeaways:

- Lessons learned, future discussion topics, etc.

General notes:

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PARTICIPANT QUESTIONNAIRE (Your open feedback is incredibly helpful)

1) The case conference gave me (check all that apply):

- Increased knowledge of clinical tools and interventions
- Increased knowledge of school-based tools and interventions
- Better understanding of how to guide students/patients with similar experiences
- Better understanding of how to work with clinic/school partners
- Support and encouragement
- New ideas for how to work with students/patients like this (please describe)

- Other (please describe)

2) What did you find most useful or helpful today?

3) What would you recommend we increase, decrease or retain in future case conferences?

4) Do you have any other comments or suggestions?

5) Your Name (Optional): _____