

# Case Conferencing



## OBJECTIVES

**At the end of this unit, participants will be able to:**

- Understand the purpose of a case conference
- Describe the difference between case coordination and case conferences
- List some practical things to consider when organizing a case conference
- Be aware of general documentation principles related to case conferences
- Identify what their site does to incorporate CHWs into the case conference process



## INSTRUCTIONS

1. Prior to the session, review the PowerPoint slides and handout. Prepare a flip chart sheet with the header: Example of Case Conferences.
2. Welcome participants and review the objectives (slide 2).
3. Review definitions of case conferences vs. case coordination and facilitate brief discussion as indicated in slide notes (slides 3–5).
4. Review slides on options for case conferences, how they are used, why one would be held, and why it would be documented in a client's record. Ask questions and facilitate brief discussion as indicated in slide notes (slides 6-10). Note responses from participants on flip chart. Review slide 8 and ask "Why do we document case conferences?" Distribute Handout "Example Case Conference form."
5. Ask, "How do you prepare for a case conference?" Review slides on how to prepare for a case conference (slides 11–12). Review slide 13 for points to cover during a case conference.
6. Review slide on what to do during and after a case conference (slides 13–14).
7. Wrap up. Ask if there are any final questions. Ask participants to each identify a key message they learned from this unit. Thank participants for their contributions.



## Related C3 Roles

Care coordination, case management, and system navigation; providing coaching and social support; advocating for individuals and communities

## Related C3 Skills

Communication skills, interpersonal and relationship-building skills, service coordination and navigation skills



## Method(s) of Instruction

Lecture, small group and dyad practice, site-specific discussions.

*Facilitator's note: Ideally an experienced CHW and supervisor present as a team.*



## Estimated time

2 hours



## Key Concepts

Case conference; service coordinator; patient plan



## Materials

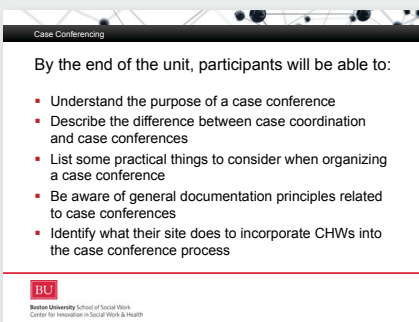
- Computer with internet access and projector
- PowerPoint slides
- Flip chart
- Markers

### Handout

- Example Case Conference Form

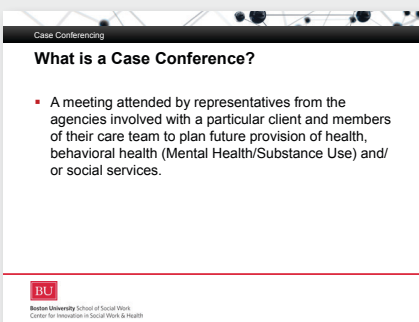


## SLIDE 1



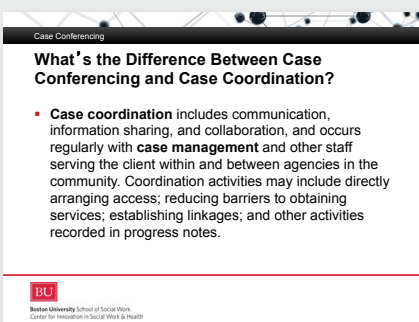
## SLIDE 2

Review the slide.



## SLIDE 3

Review the slide.




## SLIDE 4

Review the slide.

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### What's the Difference Between Case Conferencing and Case Coordination?


- **Case conferencing** differs from routine coordination. Case conferencing is a more formal, planned, and structured event separate from regular contacts. The goal of case conferencing is to provide holistic, coordinated, and integrated services across providers, and to reduce duplication. Case conferences are usually interdisciplinary, and include one or multiple internal and external providers and, **if possible and appropriate, the client and family members/close supports.**

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### Options for Case Conferences


- May be face-to-face or by phone/videoconference.
- May be held at routine intervals or during periods of significant change (e.g., change in medication, change in housing status of the client, etc.)

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### Case Conferences Can Be Used:


- To identify or clarify issues regarding a client's status, needs, and goals
- To review activities including progress and barriers towards goals; to map roles and responsibilities
- To resolve conflicts or strategize solutions
- To adjust current service plans.
- **What are some examples of situations when a case conference would be helpful?**

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### Case Conferences are Documented in the Client's Record

- **Why would you document a case conference in the client's record?**
- A case conference form can help document the participants, topics discussed, and follow up needed as a result of a case conference. When distributed immediately to attendees, the form reminds each participant of the roles and activities they've agreed to perform.
- See sample case conference form

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## SLIDE 5

Review the slide.

Ask, "What do you notice are differences between the two?" Write responses on flip chart.

Ask, "How many people in your agency participate in case conferences? Case coordination?"

## SLIDE 6

Review the slide.

## SLIDE 7

Review the slide.

Ask, "What are some examples of situations when a case conference would be helpful?"

Note responses on flip chart.

## SLIDE 8

Ask, "Why would you document a case conference in the client's record?"


Write responses on flipchart.

Review the slide.

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## Why Are In-person Case Conferences Helpful?

- Although more difficult to arrange, a face-to-face case conference can clarify issues or resolve conflicts more directly than conferring with parties separately or by phone. Involving clients in face-to-face case conferences with providers encourages participation and recognizes their role in the process.
- **What are some examples of situations when you might want to involve the client?**

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## SLIDE 9


Review the slide and ask, "What are some examples of situations when you might want to involve the client?"

Write responses on flip chart.

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## Front and Center

- What is the main focus and purpose of the case conference?
- Be specific: what do you want to achieve and what outcome are you looking for?
- **Why is this important?**

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## SLIDE 10

Review the slide and facilitate a discussion, writing responses on flipchart.

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## Preparing for a Case Conference

- Create an agenda
- Assign a facilitator, notetaker, and timekeeper
- Identify participants and their roles
- Get appropriate ROIs (release of information) signed
- Gather key data/information (external and internal) and share with participants ahead of time.
- Find a comfortable, convenient location
- Determine how decisions will be made; strive for consensus

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## SLIDE 11

Review the slide.

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## Preparing for a Case Conference

- Invest in reminder calls to participants (worth the time)
- Provide refreshments
- Get there early to set up the room
- **What else you should do to prepare?**

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## SLIDE 12

Review the slide.

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**During the Case Conference:**

- Set ground rules
- Maintain boundaries and confidentiality
- Speak of the client respectfully
- Determine what will be shared with the client, other staff, and how this will be communicated

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## SLIDE 13

Review the slide.

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**After the Case Conference**

- Type up and distribute notes as agreed
- Follow up on assignments
- **What do you do when assignments are not completed and/or agreements are not honored?**

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## SLIDE 14

Review the slide.

Ask, “What do you do when assignments are not completed and/or agreements are not honored?”

Examples to note:

1. If you can't follow up as the CHW, or if you have trouble with a partner or team member, talk with your supervisor to make a plan.
2. If the client is not following through, ask your supervisor for advice. During your next meeting with the client, bring the case conference agreement and the care plan and discuss openly what next steps would be realistic for the client.

# Example Case Conference Form

<b>Client Name:</b>		<b>Chart #:</b>	
<b>Organizer:</b>		<b>Case Conference Date:</b>	<b>Time:</b>
<b>Client to be present at meeting</b> Yes <input type="checkbox"/> No <input type="checkbox"/>		<b>Meeting Location:</b>	
<b>Case Conference Participants &amp; Title</b>	<b>Agency &amp; Phone</b>	<b>Signed ROI</b>	<b>Phone or In Person</b>
		Yes <input type="checkbox"/> No <input type="checkbox"/> NA <input type="checkbox"/>	In Person <input type="checkbox"/> Phone <input type="checkbox"/>
		Yes <input type="checkbox"/> No <input type="checkbox"/> NA <input type="checkbox"/>	In Person <input type="checkbox"/> Phone <input type="checkbox"/>
		Yes <input type="checkbox"/> No <input type="checkbox"/> NA <input type="checkbox"/>	In Person <input type="checkbox"/> Phone <input type="checkbox"/>
		Yes <input type="checkbox"/> No <input type="checkbox"/> NA <input type="checkbox"/>	In Person <input type="checkbox"/> Phone <input type="checkbox"/>
		Yes <input type="checkbox"/> No <input type="checkbox"/> NA <input type="checkbox"/>	In Person <input type="checkbox"/> Phone <input type="checkbox"/>
		Yes <input type="checkbox"/> No <input type="checkbox"/> NA <input type="checkbox"/>	In Person <input type="checkbox"/> Phone <input type="checkbox"/>
<b>Purpose of case conference:</b>			
<b>Brief assessment of client status and unmet needs:</b>			
<b>Progress in current service plan and/or other notes:</b>			



**ACTION PLAN ASSIGNMENTS FOLLOWING CASE CONFERENCE MEETING (Track actions)**

Individual/Agency	Action Item	Due Date	Follow Up Notes

**Organizer Signature & Date:**

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**Supervisor Signature & Date:**

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# Acknowledgements

This curricula draws from and is adapted from other training curricula for peer educators and community health workers, such as the Building Blocks to Peer Success (<https://ciswh.org/resources/HIV-peer-training-toolkit>) and the Community Capacitation Center, Multnomah County Health Department (<https://multco.us/health/community-health/community-capacitation-center>)

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