

Care Conference Care Conferences include an interdisciplinary team offering input from various perspectives to solve clinical conundrums and complex challenges impeding high and rising risk member progress

Care Conference Step by Step Guide Example

1. Identify candidate (a patient who would benefit) for care conference
 - Criteria to consider:
 - Acute social needs – financial crisis, unsafe home environment,
 - Unstable clinical condition – hypoglycemic episodes; COPD flares, CHF
 - Unstable mental conditions- Severe Manic / Depression in Bi-polar conditions; poor controlled schizophrenia; Severe depression;
 - Recurrent ED or hospitalizations
 - Patient struggles with med compliance/side effects
 - Patient with no movement on goals
 - Other:
2. Identify current members of the patients care team to include
 - PCP & key team members – consider triage
 - Behavioral health support – internal or external
 - CDE
 - Health coach
 - Pharmacist
 - Other
3. Identify team members who could provide input but may not be on the team:
 - Behavioral health
 - Health coach
 - Benefits staff
 - Social worker – Community Health Worker
 - Pharmacist
 - Specialty providers/staff, if applicable
4. Create an initial value statement for the care conference
 - Communicate the purpose of the care conference, consider role specific role/responsibility content if applicable.
 - Example: The purpose of the care conference is to ensure optimal care plan for patients with complex health and social needs.
 - Solicit team input on patient needs
 - Engage the team to define the goals and ensure that all agree on the goals
 - Collaborate and bring team expertise to define steps and opportunities to meet the goals
 - Example: Role Specific Needs

- Pharmacy review for potential medication side effects that impact energy level
- BH update on mental health status as it impacts much of patient ability to act on goals
- PCP – confirm clinical goals
- Create patient summary to share in advance

5. Schedule Care Conference

- Consider a recurring Care Conference time slot for all team members to facilitate ease of scheduling
- If not recurring, schedule a minimum of 2 weeks in advance
 - Send note on patient to be reviewed 2 weeks prior
 - Send update / reminder 1 week prior, include patient summary
- Solicit input prior on priority patients for Care Conference discussion, ideally three weeks prior
 - Consider potential of discussing multiple patients, if applicable

6. Care Conference event

- Introductions if applicable
- Review general purpose of care conference
- Identify person to keep notes from discussion
- Review Patient Summary – with additional detail, include potential value opportunities with care conference and collaboration
- Engage attendees in patient care review
 - Solicit input and expertise
 - Summarize next steps, updated goals, action steps, accountability
 - Define documentation in patient chart for all to review
 - Define follow-up timeframe
- Schedule follow-up if applicable or communication