

Care Conference Team Roles and Responsibilities

Care Conference Owner:

- Identify patient who would benefit from team collaboration to improve their health
- Define team members appropriate for care conference – those on team, those who should be on team, those whose input may benefit the patient
- Schedule care conference – recommend 3 weeks out if possible
 - Define day/time/place
 - Offer and coordinate virtual option as needed
- Send Care Conference Patient Summary 2 weeks prior
- Send reminder 1 week prior
- Care Conference event
 - Facilitate the care conference
 - Lead patient care review discussion and review purpose of care conference
 - Elicit input from team members, encourage care discussion
 - Manage time and discussion
 - Ensure notes and action step documentation
 - Update Care Plan as appropriate
 - Define time/process for Care Plan review/update with patient
 - Coordinate care conference follow-up as indicated

Care Conference team members

- Review patient record prior to care conference
 - Clinical notes and most recent visit
 - Lab and x-ray results and trends
 - Social history and screenings
 - Care management notes and care plan
 - All team member most recent notes
- Review patient summary provided two weeks prior to Care Conference
 - Review needs based on your area of expertise
 - Do research as indicated and bring resources that may be appropriate
 - Come prepared to collaborate and contribute based on your area of expertise
- Attend Care Conference
 - Collaborate and contribute as appropriate
- Complete and follow-up action items as appropriate
 - Document action items as appropriate