Planning dementia care through case conferencing

PLANNING CHECKLIST

This checklist is to help you plan and conduct a case conference.

PART A: GROUNDWORK: (Up to four weeks prior to meeting)

- ❑ **TRIGGERS:** Identify individuals that would benefit from a facilitated case conference according to the following criteria
  - ❑ New or worsening symptoms
  - ❑ Functional or clinical status decline
  - ❑ Poor appetite or reduced oral intake
  - ❑ Return to Residential aged care facility following discharge from acute care or Emergency Department (ED) presentation
  - ❑ Family distress or disagreement about care
- ❑ **CREATING THE TEAM:** Identify and list all health care professionals whose input is relevant to the individual needs of the resident and family eg GP, Facility care staff, Oncology, ACAT, dietician, speech therapy, OT, physiotherapist, activities officer, etc. Identify the time to be allocated for the case conference, taking into consideration the complexity of issues to be discussed and the number of participants.
- ❑ **MEETING VENUE:** Book the relevant meeting room and confirm teleconference facility available if required.
- ❑ **SCHEDULE IN ACCORDANCE WITH PARTICIPANT AVAILABILITY:** Contact all relevant team members and the family and/or Person Responsible to agree the best meeting date, time and place. Inform each member who else will be involved and ask if anyone else needs to be included.
- ❑ **INVITING THE GP:** Follow up the phone invitation to the GP with the fax. Notify practice staff or the practice manager to book the case conference into the GP's patient appointment schedule.
- ❑ **GATHER RELEVANT RESIDENT INFORMATION:**
  - ❑ Meet (in person or by telephone) with the resident/Person Responsible and family to discuss care issues, including advance care planning decisions. Explain how the meeting is run.
  - ❑ Meet with care staff to identify issues for inclusion. Encourage all staff to contribute by placing the "Staff Communication Sheet" in the individuals file along. Identify the most appropriate team member to present the information at the case conference.
- ❑ **ASSESSMENTS:** Based on the issues identified, ensure that that all relevant assessments, including evaluation have been completed. Findings from the assessments should be documented in the clients/residents record.

PART B: PRE-MEETING PREPARATION: (One week prior to meeting)

- ❑ **CONFIRMING TEAM MEMBERS:** Contact all of the relevant team members, person responsible and the family, confirming the case conference meeting date, time and place.
- ❑ **CLARIFY ROLES, MEETING PROCESS & ISSUES TO BE DISCUSSED:** Speak with all participants prior to the meeting, clarifying their role, the case conference process and clearly identify and prioritise the desired outcomes.
- ❑ **TELECONFERENCE:** If the team members are participating via teleconference, ensure everyone has the dial-in details and an alternate number (mobile) in case of technical problems.