
CASE CONFERENCING AGENDA – MODERATOR

TIMING	ACTION ITEM	NOTES
Minutes 1-5	<ul style="list-style-type: none"> • Welcome • Moderator introduces him/herself • Ask all to have a copy of Case Conferencing Call Etiquette on hand • Ask if there are any questions • Address questions • Reiterate importance that all participate • Roll Call 	
Minutes 5-30	<p>Case presentation #1 5 - 7 minutes</p> <ul style="list-style-type: none"> • The case is presented <ul style="list-style-type: none"> ○ Brief background: client’s health, functional, psychological, legal, financial status as well as relevant details of family/support network ○ State problem <p>15 minutes</p> <ul style="list-style-type: none"> • Colleagues problem solve, provide input, address transference/counter-transference issues at work, share resources and suggest “next actions”; colleagues provide feedback regarding performance of or use of the core functions of care management; discuss documentation needed <p>3-5 minutes</p> <ul style="list-style-type: none"> • Moderator wrap up 	
Minutes 30-55	<p>Case presentation #2 5 - 7 minutes</p> <ul style="list-style-type: none"> • The case is presented <ul style="list-style-type: none"> ○ Brief background: client’s health, functional, psychological, legal, financial status as well as relevant details of family/support network ○ State problem <p>15 minutes</p> <ul style="list-style-type: none"> • Colleagues problem solve, provide input, address transference/counter-transference issues at work, share resources and suggest “next actions”; colleagues provide feedback regarding performance of or use of the core functions of care management; discuss documentation needed <p>3-5 minutes</p> <ul style="list-style-type: none"> • Moderator wrap up 	
Minutes 55-60	<ul style="list-style-type: none"> • Thank all for attendance and input • Roll Call, participants must be present at the beginning and end of the call to get credit 	