
CASE CONFERENCING MODERATOR INSTRUCTIONS

Thank you for volunteering to moderate the case conferencing session being held on _____(date). As the moderator, you will be responsible for taking roll at the beginning and end of the call or in-person session, guiding the discussion, signing off on the Case Conferencing Peer Review form, and sending the form back to each participant for their records.

The Case Conferencing Agenda attached provides a general outline for the one-hour session. The bulk of the time will be spent discussing two separate cases. Please be sure that you have arranged to have two participants present cases and that they send a completed Case Presentation Form to you for distribution to the other participants at least 48 hours in advance.

A few minutes before the session is to begin, you should be on the call or at the meeting site to welcome participants. It is highly recommended that you begin promptly at the scheduled time and do not wait for participants who are late. The first five minutes are designated for welcoming participants, introductions, answering questions, and reviewing the Conference Call Etiquette sheet (if it's a telephonic session).

Case #1 is presented and then opened for discussion and problem solving. As the moderator, you should ensure that the following issues are covered:

- Ø The use of clinical skills and core case management functions
- Ø Ethical dilemmas
- Ø Appropriate interventions
- Ø Potential transference/counter-transference issues
- Ø Documentation

It may be necessary to encourage reticent/inexperienced colleagues to participate more actively if others are dominating the conversation. Keep an eye on the time and allow a few minutes to wrap up the case before moving on to Case #2. The guidelines will be the same as Case #1.

Wrap up the second case five minutes before session is to end. Take roll call at end of meeting.

Complete your portion of the Case Conferencing Peer Review form and return it to the call participants. Keep a copy of the form for your records as well.