**Form 5 - Case Conference Tool**

**Individual Protection Case Management for Persons with Specific Needs**

**Please check one:**  INTER-AGENCY CONFERENCE  INTERNAL CASE CONFERENCE

**Consent to obtain and/or release information**

**Name of Person of Concern:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Address:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I/We\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ give permission to release and exchange current and historical information for the purposes of case planning and review. The participants of the meeting may include representatives from the following agencies (list):



Signature of Agency Witness \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Individual/Parent/Guardian \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date \_\_/\_\_/\_\_ (Day/Month/Year)

\*In the case of a child under 18 years old, authorization must be signed by the parent or legal guardian based on best interest principles. This consent can be rescinded in writing at any time.

**Case conference meeting minutes**

Date of case conference: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Person of Concern’s Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Person of Concern present at meeting: Yes No

Conference facilitator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Lead person/agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Consent signed: Yes No

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| --- | --- | --- | --- |
| Attendees | | | |
| Name | **Agency** | **Email** | **Phone** |
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| Case Description |
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| Purpose of Meeting |
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| --- | --- | --- | --- |
| Action Plan | | | |
| Agency/Individual Involved | **Goals** | **Action** | **Due Date** |
|  |  |  |  |
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**Case conference checklist**

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| Inform the individual/family of purpose and function of meeting | Comprehensive Assessment is filled and up to date.  Review of needs, goals, strengths and resources has been complete.  Identify with the individual/ family who and what would be most useful in assisting them with attaining their goals.  Introduce case conference/service coordination meeting process with the goal of the coordination of services.  Discuss meeting process; strengths and resources of the family, families’ goals, the services role in supporting and working with the individual/ family (when, where, who), how the resources work together, communication process.  Identify strengths and goals that the individual/ family would like discussed.  Identify with the individual/ family who they want to attend the meeting (formal/informal supports).  Discuss and complete the consent for release of information.  Identify time and venue for meeting.  Notify Supervisor for the need to hold a case conference. |
| Inviting  Service  Participants | Inform of purpose and function of meeting.  Identify goals that participants may currently be working on with the family/individual.  Describe participant’s role at meeting.    Documentation is prepared such as consent forms, confidentiality agreements, previous/relevant care plans, etc…  Confirm time, place, and their attendance. |
| Meeting Preparation | Confirm time and place with participants.  Send out agenda for meeting.  Prepare summary of what you will present - materials needed.  Identify who will chair and take minutes.  Send one-page summary to participants. |
| Meeting: | Facilitate/chair meeting.  Introductions and purpose.  Set ground rules such as: individual/ family focused, strength based, problem solving, brainstorming, coordinating, planning, confidentiality.  Confirm recorder for minutes - inform that copies will be provided with consent.  Follow the set agenda and try and keep to a time schedule.  Involved family/individual and enlist their input (Advocate) at all levels of discussion.  Conclude the meeting with set goals and actions. |