

**CASE CONFERENCE PREPARATION CHECKLIST**

INDIVIDUAL'S NAME: \_\_\_\_\_

Date of Case Conference: \_\_\_\_\_ Time: \_\_\_\_\_ Location: \_\_\_\_\_

Case Manager: \_\_\_\_\_ Contact Brant RC: \_\_\_\_\_

**Purpose of the Case Conference:**

Clear goals for the Case Conference need to be identified: \_\_\_\_\_

\_\_\_\_\_

**Who will Attend:** Invite the individual and family as well as service providers involved with the family and those that potentially could be involved. The individual/parents are encouraged to attend.

Client \_\_\_\_\_

Parents \_\_\_\_\_

Guests \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Consents:**

Ensure a Consent Form has been signed by the individual/family with all agencies invited to attend the Case Conference.

**Other Preparation:**

Prepare a one page Executive Summary\* to be distributed at the meeting should include the goals of the support as well as:

- Significant recent life events
- Current behaviour
- History of difficulties and what has been successful/unsuccessful
- Family situation
- Academic/vocational adjustment

Assessments and reports (if recent) may be helpful to the Case Conference members in planning and coordinating services. Consider bringing copies of appropriate documentation:

\_\_\_\_\_ Contact Brant Intake/Referral Package

\_\_\_\_\_ Board of Education I.P.R.C.

\_\_\_\_\_ Psychological, Psychiatric, Social, Family History Assessment/Reports & Recommendations.

\_\_\_\_\_ Probation/Predisposition Reports and Recommendations.

\_\_\_\_\_ Individual Plans

\_\_\_\_\_ C.A.S. Reports and Recommendations

\_\_\_\_\_ Case Profile Checklist\* (\*Refer to RPAC package)

## CASE CONFERENCE INFORMATION for CASE MANAGERS

### **Preparation for a Case Conference:**

Call a Case Conference when: the individual/family requires further supports; the individual/family's needs have changed and are in need of services urgently or in the near future; community agencies working to support an individual/family need to communicate and coordinate supports on behalf of the individual/family; intervention or prevention is deemed important; or, planning for individual/family's outcomes

Have a purpose for the meeting that is clear

Invite individual/family, the community service providers involved with the family and agencies the family would like to have involved; invite other players as appropriate

Ensure a Consent Form has been signed by the individual/family for information sharing with all agencies invited to attend the Case Conference

Prepare a one page Executive Summary to be distributed at the meeting, that will include:

- significant recent life events;
- current behaviour;
- history of difficulties and what has been successful/ unsuccessful;
- family situation;
- academic/vocational adjustment;
- goals of support/treatment;
- additional comments

Case Profile checklist may be helpful to complete and distribute to community team attending the meeting

Identify who will Chair the meeting and who will take minutes

### **Case Conference Meeting:**

15 minutes prior to the meeting, be available to meet with the individual/family to put them at ease, explain the format of the meeting, ask them if they would feel comfortable to briefly present their current situation and what support they would like at the meeting

Present briefly the information included in the one page Executive Summary: Begin with the strengths of the individual/family to focus on what can be built upon and make family more comfortable

Support individual/family; set another Case Conference date if appropriate

### **Case Conference Follow-up:**

Follow-up on any actions; continue to coordinate with service providers; distribute minutes.

\* Contact Brant is available to provide support and information to you through this process - call a Resource Coordinator.