



Case Conferencing Checklist

The Case Conferencing Checklist provides steps for planning and carrying out Case Conferences.

STEPS	TASKS
Step 1 Plan the Case Conference	<ul style="list-style-type: none"> <input type="checkbox"/> Understand Requirements for Case Conferences – Multidisciplinary Case Conferences and Mental Health Case Conferences <input type="checkbox"/> Identify Goals and Participants: Determine the purpose (e.g., care planning, crisis management, progress review) and select key stakeholders, including healthcare providers, allied health professionals, social workers, family members, and the client when appropriate. <input type="checkbox"/> Gather Relevant Information: Collect case files, medical histories, assessments, and prior care plans. Ensure consent for information sharing is confirmed. <input type="checkbox"/> Schedule and Communicate: Arrange a suitable date, time, and location; send agendas and documentation to all participants ahead of time. <input type="checkbox"/> Assign Roles: Assign facilitator/chair, note-taker, and timekeeper responsibilities to maintain flow and structure. This may be the role of the practice nurse at the general practice.
Step 2 Team Roles & Responsibilities	<ul style="list-style-type: none"> <input type="checkbox"/> General Practitioners (GPs) <ul style="list-style-type: none"> • Clinical Lead: Typically serve as the lead clinician, responsible for initiating and coordinating the case conference. • Care Planning: Develop and review care plans, provide referrals, and ensure follow-up. • Communication: Share clinical summaries, patient goals, and updates via secure messaging and My Health Record. <input type="checkbox"/> Practice Nurses (PNs)/ Care Coordinators / Nurse Navigators <ul style="list-style-type: none"> • Care Coordination: Support follow-ups, recalls, and monitoring of patient progress. • Clinical Input: Provide insights into patient barriers, enablers, and social risks. • Documentation: Update shared health summaries and assist with My Health Record entries. • System Navigation: Coordinate referrals and communication with all members attending the case conference (GP, allied health, specialists, pharmacist and others). • Health Literacy Support: Empower patients in self-management, understanding care plans. <input type="checkbox"/> Allied Health Professionals (AHPs) <ul style="list-style-type: none"> • Specialist Input: Deliver targeted interventions (e.g., physiotherapy, dietetics, psychology). • Medication Management: Pharmacists conduct reviews and audits, educate clinicians. • Team Collaboration: Participate in huddles and case conferences. Use MBS to participate in multidisciplinary case conferences with the patient's medical practitioner and other providers. <input type="checkbox"/> Aboriginal and/or Torres Strait Islander Health Practitioners / ACCHO Liaison <ul style="list-style-type: none"> • Cultural Safety: Ensure care is culturally appropriate and inclusive. • Community & holistic care Linkage: Bridge communication between clinical teams, service providers and community supports. • Coordination and Clinical Care: Coordinate and deliver care (NAATSIHWP scope of practice). <input type="checkbox"/> Medical Specialists <ul style="list-style-type: none"> • Specialist Input: Deliver targeted interventions. • Communication: Share clinical summaries, patient goals, updates via secure messaging and My Health Record. <input type="checkbox"/> Other Providers, Specialists and Consultants
Step 3 Information Sharing & Action Planning	<ul style="list-style-type: none"> <input type="checkbox"/> Each participant presents critical details regarding barriers, needs, strengths, or risks, avoiding storytelling and focus on actionable information. <input type="checkbox"/> The facilitator summarises key points to maintain clarity and ensure common understanding among participants. <input type="checkbox"/> Develop action plans with clearly assigned responsibilities, deadlines, and measurable objectives. <input type="checkbox"/> Ensure availability and establish next steps for follow-up, including scheduling future reviews.
Step 4 Tools & Templates	<ul style="list-style-type: none"> <input type="checkbox"/> Templates for Invitations and Attendance: Standardised forms help track participant roles, consent, and participation status. <input type="checkbox"/> Action and Follow-Up Templates: Structured tables for listing objectives, responsible parties, deadlines, and areas for review support accountability. <input type="checkbox"/> Case Presentation Slides or Checklists: Visual aids and step-by-step guidance ensure clarity when presenting complex cases.