



Case Conferencing Checklist

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

STEPS	TASKS
Step 1	<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.
Plan the Case Conference	<ul style="list-style-type: none"> <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	<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	<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	<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.
Tools & Templates	