Interprofessional Patient Conference Worksheet

Purpose of conference:				

1: Individual preparation (completed by each student before meeting with the team)

☐ Review the case. ☐ Identify potential concerns of the patient/family. ☐ Identify and acquire information needed. ☐ Identify potential priorities for your discipline in the case conference.	**Profession-specific priorities**: 1. 2. 3.	**Notes**:		

2: Team preparation (discuss as a team prior to the patient's arrival)

Set priorities to address in meeting: ☐ Discuss the priorities identified by each team member. ☐ Decide which issues (max 4) to discuss in the conference.	**Priority #1**:	**Priority #2**:	**Priority #3**:	**Priority #4**:
☐ Identify the key team members for each priority.	**Names**:	**Names**:	**Names**:	**Names**:

3: Clarifying the meeting processes (discuss as a team prior to the patient's arrival)

☐ Assign team roles to each team member. Remember: All team members occupy both a *team role* and their *discipline role* during the meeting.	**Initiator**: Guides goal setting and facilitates meeting progress. **Name**:	**Recorder**: Records the proceedings, provides notes to patient/family. **Name**:	**Timekeeper**: Ensures that the team is on track and the meeting ends on time. **Name**:	**Advocate**: Advocates for perspectives not heard, including the patient's. **Name**:
	Process Analyst: Comments on methods to enhance group process. **Name**:	**Energizer**: Encourages and supports team members, where required. **Name**:	**Participant**: Supports team members in their roles, where required. **Name**:	**Participant**: Supports team members in their roles, where required. **Name**:

Discuss:	Notes:
❒ How will your team clarify and address the patient/family's goals? ❒ How will your team clarify your roles for the patient/family? ❒ How will process issues be addressed during the meeting (e.g., if you are running out of time)? ❒ How will your team know if the meeting is successful?	

4: Agenda and notes
- **Set the agenda as a team, aligning it with the priorities chosen in step 2, before the patient arrives.**
- **Recognize that you may need to be flexible to ensure the patient's concerns are heard and addressed during the conference.**

Agenda (set before the meeting):	Notes (taken during meeting):	Follow-up required: