

## CASE CONFERENCE PROTOCOL

### BEGINNING OF EPISODE REVIEW: (SOC or Recert)

#### OASIS Review and Risk Identification and Plan for Reduction

OASIS items reviewed, corrections made based on consensus discussion.

What criteria put the patient at risk for hospitalization? What criteria put the patient at risk for falls?

How will each person reduce the identified risks?

#### Collaborative Goal Setting and Targeted Outcomes

Patient identified goal, engagement, readiness for self-management:

Outcome measures targeted or at risk:

#### Plan of Care and Care Coordination

What is the primary focus of POC and the frequency and duration for each discipline?

Is the POC tapered to allow patient to better self-manage?

What will the patient do between visits?

What can other team members do to reinforce what you've asked the patient to do?

Is there a Plan of Action or disease management protocol to assure improved targeted outcomes?

**Diagnoses** sequencing and coding confirmed or completed.

### UPDATE REVIEW: (ROC, high risk or high utilization patients)

#### Resumption of Care

What was the reason for hospitalization? Were there issues with medication management?

Date of last visit prior to hospitalization? Was the agency called first?

What risk reduction interventions were being used by each discipline?

#### Guided Discussion re Goals

Is the patient making progress toward goals as expected? Are the goals appropriate?

#### Plan of Care and Care Coordination

Is the patient engaged in the plan of care?

What can other team members do to reinforce what you've asked the patient to do?

Does the POC (including frequency) need to be revised?

### PROPOSED RECERT OR D/C REVIEW:

#### Planned Recertification 2 Weeks Prior

What is expected to be accomplished in a new cert period not accomplished by now?

#### Planned Discharge 2 Weeks Prior

Are there unexplained outcomes that declined or stabilized?

Are the vaccine data elements completed correctly?

Do outcomes achieved appear to be sustainable?

Have discharge plans been put in place?