



Vermont Integrated Communities Care Management Learning Collaborative

Care Team Conference:

1. Once you have identified and recruited patients; learned their story; reviewed their health history; and conducted a root cause analysis, the next step is to convene the entire Care Team for an initial conference.
 - If your team has never held a Care Conference before, it may be useful to hold a planning meeting (or “Huddle”) prior to the first Care Conference. This is especially true in cases where the team is not well known to one another and system root causes must be addressed.
 - In addition to reviewing Root Causes, this time may be used for team members to clarify their roles, their availability, and their process for working with the complex patient.
 - The team will then develop the agenda for the first Care Conference.
2. The first Care Team Conference is initiated by the person with a trusting relationship with the patient. This is often the Lead Care Coordinator (LCC), but in some cases it may be another member of the care team.
 - LCC invites key members of the patient’s social and medical support system (identified from previous steps in the integrated care management process). Whenever possible team members should participate in person, but video or phone conferencing should be available to enable all members of the team to participate.
 - LCC sends agenda to all Care Team members prior to the meeting.
 - The patient is always invited to participate in the Care Conference. If the patient declines, or the team has reason to believe the meeting itself will adversely effect the patient’s physical or mental health status, or otherwise reduce her current level of functioning, the patient is encouraged to send a designee to represent her interests.



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- LCC facilitates the meeting or appoints a facilitator.
- Conclude the meeting by agreeing on an Action Plan. Identify next steps, responsible party, and time line. Set a date for the next meeting or clarify circumstances that would trigger another meeting of the care team.

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