



CFP TECHNICAL ASSISTANCE BULLETIN

CASE CONFERENCES

01C-08 JULY 2008



Background

While the Community Follow-up Program Request For Qualifications (RFQ-3/95) states that case conferences with all agencies involved in the Service Plan is a billable activity (pg.15), the RFQ does not provide a detailed description of "case conference". The following Technical Assistance Bulletin explains case conferences in more detail, and describes the AIDS Institute's expectations for case conferences.

Program Standards and Guidance

Case Conferences are billable encounters between a Case Manager and a clients' other service providers. Service providers may include physicians, medical social workers, benefits case workers, drug counselors, family members, or others **outside** the CFP team that provide or coordinate services for the CFP client. Case conferences can also occur between the CFP team and **other internal programs** within agencies. Discussions solely among team members, i.e., Case Managers, Case Management Technicians, or Community Follow-up Workers are not considered Case Conferences, and therefore are not billable. Clients and family members may participate in Case Conferences, but participation is not required. Members of the case management team may participate in Case Conferences as necessary, but only one billable staff may bill for the Case Conference.

The purpose of Case Conferencing is to coordinate services and activities with the CFP team and other providers. Case Conferences allow Case Managers and service providers to

exchange pertinent client information, discuss accomplished goals and unmet needs, and assess client's status. Case Conferences enable Case Managers to discern client's needs, establish plans and goals for service provision and case coordination, determine activities and tasks, eliminate duplication of effort, and to delineate responsibilities related to particular services among all providers.

Case Conferences are required at Reassessment, but can also occur as needed. Case Conferences may occur with all service providers at one time, or may occur with only one provider. Case Conferences ideally occur face-to-face, but may also occur over the telephone.

Details of Case Conferences must be documented to substantiate the amount of time billed, and must be included in the case record in chronological order. Case Conferences must be documented on specific Case Conference forms or in Progress Notes, and must detail the names, positions, and agencies of participants, issues discussed, and the plan for service provision and follow-up. Activities and individual responsibilities that result from Case Conferences should be added to Service Plans, with a client's consent.

Case Conference Requirements

- Case Conferences are between a Case Manager and a client's service providers. Clients and other CFP case management staff may participate, but only one staff person may bill for the case conference session.

- Case Conferences can occur with the Case Manager and several service providers at one time, or with only one service provider. Case Conferences may occur face-to-face if feasible, but may also occur over the telephone.
- Case Conferences are dialogues that foster cooperation and communication between the Case Manager and service providers, and reduce duplication of services. Case Conference discussions focus on describing clients' status, determining clients' needs, and establishing a plan of action to address unmet needs. Case Conferences designate task responsibilities, and set timetables for follow-up.
- Case Conferences must be documented in Progress Notes, or preferably, on a specific Case Conference form in chronological order. Documentation must include specific start and end times, participant's names, titles, and agency, items discussed, and the plan of action and responsibilities. All activity responsibilities should be added to Service Plans, with a client's consent.

(Recommendation: Case conference forms should be kept in the progress note section. If done on colored paper they can be quickly identified.)

- Preparation for the Case Conference is not billable activity; it is general administrative responsibility. The actual filling out of the form should take place during the Case Conference session, which is billable. The updating and/or revision of the Service Plan is also billable.
- *Case coordination is an ongoing process whereby the case management team identifies, advocates for, and secures the services determined to be appropriate for a particular client, and does follow-up to determine that the client is receiving these services. It is a process of working with the providers of services to prevent duplication and ensure that appropriate, quality services are being received. Case coordination is an essential part of the Case Conference process.*