CASE PRESENTATION

VERBAL CONTENT OF PRESENTATION (sample)

Reason for Presentation
periodic review, disposition, problem specific, etc.

Identifying Data
admission date, personal demographics including living situation, family information

Presenting Problem(s)
client's presenting complaint, service staff's perceptions including behavioral and symptomatic manifestations

History relevant psychosocial, medical, and psychiatric

Diagnosis
review supporting diagnostic criteria

Current Service Plan
short and long-term goals, service modality and approach, estimated duration, medications

Family/Service Staff Relationship
cultural/language issues, psychodynamics

Progress Towards Goals
factors leading to or interfering with change

DOCUMENTATION

Required minimum: Date of presentation, Reason for presentation, Issues discussed, Service suggestions

Signature (primary service staff/supv. when required) and Discipline

This confidential information is provided to you in accord with applicable Welfare and Institutions Code Section. Duplication of this information for further disclosure is prohibited without the prior written consent of the patient/authorized representative to who it pertains unless otherwise permitted by law. Destruction of this information is required after the stated purpose of the original request is fulfilled.

Name: MIS#:

Agency:

Los Angeles County - Department of Mental Health

CASE PRESENTATION

THIS IS A REDUCED VERSION OF THE ACTUAL FORM.

CASE PRESENTATION

Purpose: This form provides a unique place for the documentation of any one of a variety of formal staff conference activities: Interdisciplinary case conferences, periodic case reviews, problem case conferences, case training conferences, disposition, conferences, transfer conferences, intake conferences, etc. In essence, it is the form that should be used to document any case conference activities that occur in a provider.

Verbal Content of Presentation: These sample items are not intended to set minimum standards or requirements for a presentation. It is intended primarily to assist students and new professionals in preparing a presentation. Many conferences will have a focus that does not include all of the elements listed, such as a conference focused on a discharge plan. Other conferences may specifically include areas not noted, but relevant to the type of conference or presentation.

Recording Procedure: The Documentation section is intentionally brief. It was designed to highlight only the issues discussed and service suggestions made at the presentation. There are a variety of other places in the service record where summaries of the patient, his/her service, or any other aspects of the case may be found. In the face of ever increasing demands on service time, it seemed unnecessary to repeat this information, thus the focus on the discussion aspect of the case conference and information which may not be available elsewhere in the service record. Individual programs may require additional documentation by specifying required content in service procedures.

If additional space is needed, use a *Progress Notes* page. Cross out any unused space at the end of the case presentation documentation.

Reason for Presentation: This should be a brief statement (such as problem specific, periodic review, interdisciplinary case conference, disposition, etc.). If the presentation is problem specific, a brief statement of the problem should follow.

Signature: The service staff presenting the case should complete and sign the form. Supervisors are encouraged to review conference documentation of their supervisees. All student/trainee notes must be co-signed by his/her licensed supervisor.

Filling Procedure: This form should be filed sequentially in the progress notes section of the service record.