Case Conference Note Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A case conference note documents a pre-arranged meeting held by two or more providers to discuss and direct one identified client's care. It records the participants, times, decisions, and allocated tasks, plus whatever elements the payer requires when the conference is billed. Conferences are billable in Australia and Ontario and in limited US contexts.

Purpose & pre-arrangement what it was convened to decide, scheduled in advance

Do: state the purpose and that the conference was pre-arranged; payers define it as a pre-scheduled meeting about one client.

Pitfall: writing up an ad hoc hallway discussion as a conference; the pre-arrangement is part of the definition.

Participants & minimum team the roster a reviewer can verify

Do: list every participant with name, credentials, discipline, and role, and confirm the minimum mix your scheme requires.

Pitfall: three physicians and nobody else fails the Australian mix rule outright; a headcount alone verifies nothing.

Consent & attendance recorded agreement, not required attendance

Do: record the client's agreement before the conference and who attended; consent is required, attendance is not.

Pitfall: consent that exists in conversation but nowhere in the record.

Times & mode day, start and end, how each participant joined

Do: record the day, start and end times, and each participant's mode: in person, video, or phone.

Pitfall: a note with no times; for a billed conference that is not a style problem, it is an unpayable item.

Discussion: needs & outcomes history, needs, outcomes to achieve, prior outcomes reviewed

Do: cover history, multidisciplinary care needs, outcomes to be achieved, and a review of previously identified outcomes.

Pitfall: "discussed client's care" with no content; an auditor treats an empty discussion section as an undocumented service.

Decisions & tasks allocated task, named member, timeframe

Do: record each decision and allocate every task to a named team member with a timeframe.

Pitfall: outcomes with no owner; task allocation to named members is the practical point of the meeting.

Distribution & signature copy filed, summaries out, author signs

Do: file a copy in the record, offer the client and carer a summary, send one to each member, and sign with credentials.

Pitfall: chasing every attendee's signature, which no rule requires, while the distribution trail goes missing.

Before you sign

- [ ] Purpose and pre-arrangement stated, single client identified
- [ ] Client agreement recorded before the conference
- [ ] Every participant listed with discipline and mode
- [ ] Start and end times recorded where billing needs them
- [ ] Each decision and task carries a named owner and timeframe
- [ ] Copy filed, summaries to team, client offered a summary

Drafting with AI

Capture the conference however it exists: a dictated recap on the walk back, the agenda with notes, or a transcript.

> *"Draft a case conference note from this recap: scheduled conference on depression with chronic pain, four participants with modes, decisions and tasks with owners: ..."*

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

150 to 400 words	**10 to 15 min by hand**	**After each scheduled conference**	**Team · chart · payers**
typical length	clinical team estimate	when it's written	who reads it

Case Conference Note Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Client (initials): | DOB: | Date:

Purpose of conference

What the conference was convened to decide; pre-arranged and scheduled in advance

Consent & attendance

Client agreement recorded (date, scope) · client/carer attending yes or no; most schemes require recorded consent, not attendance

Participants

Name, credentials, discipline/role, mode (in person / video / phone); note the minimum team mix

Discussion

History and current needs · outcomes to be achieved · previously identified outcomes reviewed

Decisions & tasks allocated

One line each: task, named team member, timeframe

Distribution

Copy in client record · summary offered to client/carer · summaries to team members

Start/end time (if billed): | Next conference or review date:

Author signature / credentials: | Date signed: