

MBS Case Conference Note Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

An MBS case conference note substantiates a multidisciplinary or mental health case conference item under Australia's Medicare Benefits Schedule. No template is legislated: the regulations fix the facts that must be recorded, from the patient's agreement to the day with start and end times, the participants, the matters discussed, and a copy filed in the medical record.

Consent, recorded first explain, ask, record the agreement; attendance optional
Do: record the patient's agreement before the conference; for mental health items, record agreement to each participant.
Pitfall: consent that exists in conversation but nowhere in the record; the recording, not a signed form, is the legislated element.

Day, start and end times the times select the time tier
Do: write the day and exact start and end times at the time; the tiers run 15 to 20, 20 to 40, and 40+ minutes.
Pitfall: absent or reconstructed times; a tier the record cannot prove is the most common PSR failure.

Participants and team mix names, professions, kinds of care
Do: name every participant; 3+ present at the same time, no more than 2 medical practitioners, each a different kind of care.
Pitfall: an email thread, a pair of clinicians, or three doctors billed as a conference; each fails the definition.

Matters discussed the enumerated set, not a summary line
Do: cover history and care needs, outcomes to be achieved, tasks allocated to named members, and prior outcomes reviewed.
Pitfall: "case discussed, plan agreed" reads to an auditor as a service that cannot be shown to have happened.

Copy filed, summaries, outcomes organiser duties; participants skip these
Do: file a copy in the patient's record; offer the patient/carer a summary, give one to each member, discuss outcomes.
Pitfall: an organiser item on a participant-grade record; organising includes participating, so never claim both.

Telehealth eligibility line attendance items only; modality lives in the item number
Do: document the pathway: face-to-face with you or your practice in the last 12 months, or the exemption relied on.
Pitfall: naming the video platform (not required) while the eligibility pathway (expected by AskMBS) goes unrecorded.

Attribution and timing at the time, or as soon as practicable
Do: sign with credentials; one dated entry per service, comprehensible enough for another practitioner to take over.
Pitfall: batch-written entries days later; a reconstructed entry is exactly what PSR findings call inadequate.

Before you claim

- ☐ Agreement recorded and dated before the conference
- ☐ Day plus exact start and end times written at the time
- ☐ Participants named; mix and synchronous rules met
- ☐ Matters discussed cover the enumerated set
- ☐ Copy filed; summaries offered and distributed (organiser)
- ☐ Telehealth: eligibility pathway documented

Drafting with AI

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

"Draft an MBS case conference note from this recap: organiser, video conference on depression care, three participants with kinds of care, 14:05 to 14:37, tasks allocated: ..."

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

150 to 400 words
typical length

10 to 15 min by hand
clinical team estimate

Every claimed conference
when it's written

Chart · Services Australia · PSR
who reads it

MBS Case Conference Note Template

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

Patient (initials): _____ DOB: _____ Conference date: _____

Role (organiser / participant): _____ Item claimed / time tier: _____

Consent & attendance

Agreement recorded (date, how) · patient/carer attending yes or no; recorded consent is required, attendance is not

Start time: _____ End time: _____ Total minutes: _____

Participants

Name, profession, kind of care, mode (in person / video / phone) · all present at the same time · 3+ members, max 2 medical practitioners, different kinds of care

Matters discussed

History and care needs · outcomes to be achieved · tasks allocated (task, named member, timeframe) · previously identified outcomes reviewed

Organiser only

Summary offered to patient/carer · summary given to each team member · outcomes discussed with patient/carer

Telehealth attendances (video/phone items)

Eligibility pathway: face-to-face with the practitioner or practice within 12 months, or the exemption relied on, documented

Copy filed in the patient's record: _____ Next review or follow-up: _____

Author name / credentials: _____ Date signed: _____