

Multidisciplinary Team Meeting Note Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A multidisciplinary team meeting note records an interdisciplinary discussion of one client's care: who attended, what each discipline reported, what the team decided and why, and the action items with owners and due dates. The meeting is often mandated; the note's format is a convention. Most run 100 to 400 words per client discussed.

Meeting header date, program, meeting type, times where billed

Do: record the date, program or unit, meeting type, and start and stop times wherever the meeting supports billing.

Pitfall: a note that proves a discussion happened but not when; the date and times are checked first against the billing calendar.

Attendees with disciplines the roster a reviewer can verify

Do: list name, credential, and discipline for each participant, and mark who led the meeting.

Pitfall: writing "team present"; composition requirements cannot be verified from a headcount.

Client & participation whose entry this is, and who was in the room

Do: name the client the entry covers and whether the client or family attended or were offered the chance.

Pitfall: silence on participation in settings where the opportunity is a documented right.

Status by discipline this client, this period

Do: record what each discipline reported: symptoms, scores, attendance, medication response, housing or benefits progress.

Pitfall: cloned text; the most-failed Joint Commission behavioral health standard involves goals not individualized to the client.

Decisions & rationale what changed, and why

Do: state what the team changed, kept, or escalated, the reasoning, and the treatment plan goal each decision serves.

Pitfall: recording the decision without the reasoning, so nobody can later reconstruct why the plan changed.

Action items task, named owner, due date

Do: write one line per task with a named owner and a timeframe; audit follow-through at the next meeting.

Pitfall: actions assigned to "team," which in practice means assigned to no one.

Concurrence & next review who approved, and when the client returns

Do: document the physician or leader concurrence where your setting requires it, and date the next review.

Pitfall: chasing signatures from every attendee, which no US, Canadian, or Australian rule requires, while missing the one concurrence that is.

Before you sign

- ☐ Date, program, and times recorded where billing needs them
- ☐ Every attendee listed with credentials and discipline; leader marked
- ☐ Entry specific to this client, this week; nothing cloned
- ☐ Each decision carries a rationale and a plan goal link
- ☐ Every action item has a named owner and a due date
- ☐ Concurrence documented where required; next review dated

Drafting with AI

Capture the meeting however it exists: a dictated recap, the agenda with margin notes, or a transcript.

"Draft a team meeting note entry from this recap: weekly treatment team, psychiatry reports stable sleep on current dose, therapy reports two sessions attended, decisions and action items with owners: ..."

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

100 to 400 words
per client discussed

5 to 15 min by hand
clinical team estimate

After each team meeting
when it's written

Team · surveyors · payers
who reads it

Multidisciplinary Team Meeting Note Template

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

Client (initials): _____ Date: _____ Program/unit: _____

Meeting details

Type (scheduled review / staffing / discharge planning) · client or family present, or invited and declined

Attendees

Name, credentials, discipline for each participant; mark the leader

Status by discipline

What each discipline reports for this client, this period: symptoms, scores, attendance, medication response

Decisions & rationale

What changed, stayed, or escalated, and why; tie each decision to a treatment plan goal

Action items

One line each: task, named owner, due date

Concurrence

Physician/leader concurrence where the setting requires it, or author sign-off

Start/stop time (if billed): _____ Next team review date: _____

Author signature / credentials: _____ Date signed: _____