Format for Discussion at the Table
2018-06-29

A standardized format would be followed by the person bringing a client situation to the table for discussion about the client situation and needs.

What is the conversation to achieve?
- develop plan of options for client
- determine lead for meeting with client
- determine timeline for meeting with client
- determine timeline for lead to inform providers of client’s decisions.

What is the standardized format, at least initially?
- Discuss new referrals first
- Referral source presents client situation (as much as is known):
  - Client name (if consent provided – otherwise hypothetical with all potential identifiers left out)
  - Give a short description of the situation that compelled you to bring this forward.
  - Known diagnoses and/or what diagnoses are suspected and what is the evidence?
  - Age
  - Current living situation
  - Is there third party-funding? Source?
  - Is the client capable for finances? For personal care? If not, who is Substitute Decision Maker (SDM) and what is the level of involvement?
  - Current service providers
  - What supports (formal and informal) are available?
  - Current psychosocial and bio-psychosocial stressors e.g. job loss, illness
  - What is going well? (Strength-based approach)
  - Previous services involvement and successful or not and why
  - Identification of anything new for the client.
  - What are the unmet needs?
  - What are the risks?
  - Level of awareness, insight, openness to service
  - Client goals
  - Identification of factors to enhance client engagement (if required)
• Navigator facilitates discussion as needed, aiming for the following questions to be answered:
  o What services do we think can assist this situation?
  o Who will meet with the client to review the options?
  o When will you meet with the client? (ballpark timeframe)
  o When do we need to hear back about the client’s decisions?

• Discuss previous referrals to track indicators
  o Navigator to coordinate which situations we still need data for and what data is required.
  o Table members provide data which Navigator adds to Excel tracking sheet