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?

- o develop plan of options for client
- o determine lead for meeting with client
- o determine timeline for meeting with client
- o 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:
    - What services do we think can assist this situation?
    - Who will meet with the client to review the options?
    - When will you meet with the client? (ballpark timeframe)
    - When do we need to hear back about the client's decisions?
- Discuss previous referrals to track indicators
    - Navigator to coordinate which situations we still need data for and what data is required.
    - Table members provide data which Navigator adds to Excel tracking sheet