

## LEVEL TWO CONFERENCE CALL WORKSHEET

**INSTRUCTIONS:** The organization must prepare a case presentation for discussion on the conference call. This worksheet is provided to aid in the documentation of the information to be presented during the conference call and provided within the notification email. It is highly recommended that this worksheet is used for this purpose.

**Age and gender:**

**Enrollment Date:**

**Participant's current status:**

**Significant diagnoses:**

**Summary of the care history**

**Summary of the event**

**Immediate actions taken**

**IDT team's main concerns related to participant prior to event:**

**Precipitating/contributing factors:**

**Participant's involvement/actions surrounding the event**

**Participant's degree of involvement in PACE program:**

**Working relationship with contracted facility, contracted services (if applicable):**

**Compliance with organization's established policies and procedures:**

**Identification of risk points and their potential contribution to the event:**

**As appropriate, proposed improvements in policies, training, procedures, systems, processes, physical plant, staffing levels, Etc. to reduce future risks**

**Initial improvements:**

**Additional improvements:**

**Quality improvement project initiated:**