EPI-SET Case Conference Agenda

# Provider Information Provider Name:

Profession:  
  
Navigate Intervention:   
  
Site:

# Patient Information:

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| Gender Identity: | Age: | Highest Level of Education |
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## Psychosocial:

Education (academic supports/accommodations

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Employment

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Income Source

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Living Situation

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Support System

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Family Support (View of mental health system)

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Formal Supports (other organizations involved in care)

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**Consultation Questions** (1 or 2 questions to be answered in the case conference):

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# History of Presenting Concerns

## Recent Psychiatric History

History (a timeline briefly summarizing the history and circumstances of the presenting problems, diagnosis, and course of treatment):

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Safety Concerns (suicidal, violence, self-care, other legal):

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Co-morbid diagnosis:

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Substance use:

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Past treatment (including hospitalizations, ED visits, outpatient):

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Past medication and response:

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## Relevant Medical History:

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## Developmental History:

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**Social History Including Legal History:**

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**Trauma History:**

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**Current Presentation:**

List the client’s identified goals:

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Are there any strengths demonstrated by the client that can be used to help them accomplish their goals?

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Are there any barriers to engaging in treatment?

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Are there any identified areas of risk or concern? Please describe.

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Any insight?

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# Progress through Intervention Model (NAVIGATE):

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Length of time in service:

## IRT:

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| **Module** | **Started** | **Completed** |
| 1 – Orientation |  |  |
| 2 – Assessment/Initial Goal Setting |  |  |
| 3 – Education about Psychosis |  |  |
| 4 – Relapse Prevention Planning |  |  |
| 5 – Processing the Psychotic Episode |  |  |
| 6 – Developing Resiliency: Standard Sessions |  |  |
| 7 – Building a Bridge to Your Goals |  |  |
| 8 – Dealing with Negative Feelings |  |  |
| 9 – Coping with Symptoms |  |  |
| 10 – Substance Use |  |  |
| 11 – Having Fun and Developing Good Relationships |  |  |
| 12 – Making Choices about Smoking |  |  |
| 13 – Nutrition and Exercise |  |  |
| 14 – Developing Resiliency – Individualized Sessions |  |  |

## Prescriber:

Progress through medication algorithm:

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Effect on symptoms (what has responded, what remains):

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Side Effects:

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Adherence:

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**Supported Education and Employement:**   
Any involvement with SEE?   
  
What are the goals of SEE and progress?

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**Family Education:**  
Consent for Family Education?  
  
What education has family received?

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Have they used “consultation” sessions/crisis management (focusing on problem solving and communication skills?

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