



Appendix 1. The case Conference Assessment Tool

Trainee's name:	<input type="text"/>	Trainee's GMC number:	<input type="text"/>
Assessor's name:	<input type="text"/>	Assessor's GMC number:	<input type="text"/>
Assessment date:	<input type="text"/>		Assessor grade:
Year of training:	ST1 <input type="checkbox"/>	ST2 <input type="checkbox"/>	ST3 <input type="checkbox"/>
	ST4 <input type="checkbox"/>	ST5 <input type="checkbox"/>	ST6 <input type="checkbox"/>
	ST7 <input type="checkbox"/>		
		Consultant <input type="checkbox"/>	
		SAS <input type="checkbox"/>	
		SpR/StR <input type="checkbox"/>	
		GP <input type="checkbox"/>	
		Other <input type="checkbox"/>	

Brief description of the activity being assessed

Complexity of case conference Low Average High

Trainee's reflections on their performance during this activity

Which aspects of the encounter were done well? Please note any areas of excellent performance

Suggested areas for improvement? Please also note any causes for concern



Please rate the trainee according to whether they performed at the level expected

At end of Foundation/in early CMT	At end of CMT	During early higher training	Mid-point of higher training	CCT/end of higher training	Unable to comment	Cause for concern
Setting the scene, introductions and agenda						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments						
Multidisciplinary teamwork and facilitation of team members						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments						
Evidence of listening skills						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments						
Clarity of explanations to patient and family						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments						
Problem-solving skills						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments						
Dealing with uncertainty, conflict or ethical issues						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments						
Ability to sum up agreed actions (and production of minutes if appropriate)						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments						

Agreed actions

Trainee's Signature

Assessor's Signature

Appendix 2. Guidance for the case Conference Assessment Tool (cCAT)

The cCAT is designed to allow assessment of the performance of a trainee in a case conference with a patient and his or her family and carers and the multidisciplinary team. Please rate the trainee's performance on actual behaviour and not on any other factor. The assessment is based on direct observation of the case conference by the assessor (eg clinical or educational supervisor). Senior members of the multidisciplinary team may also complete the cCAT, provided that they have been trained in its use.

Instructions

- > Agree in advance which case conference will be assessed.
- > Please score the trainee on the scale shown for the seven competency areas and record brief comments if appropriate; each area should be relevant to every assessment.
- > Discuss the trainee's performance, allowing the trainee to reflect first on how the case conference was conducted.
- > Please give feedback to the trainee after the assessment about what went well, recognising any areas of excellence and what could be improved – especially where deficiencies have been identified.
- > Agree an action plan for the trainee to improve on his or her performance.

Descriptors of competencies demonstrated during case conferences

Setting the scene, introductions and agenda	Appears well prepared for the meeting. Encourages participants to introduce themselves by name and title. Clearly identifies the purpose and objectives of the meeting.
Multidisciplinary teamwork and facilitation of team members	Values and acknowledges the contribution and expertise of each team member. Ensures that each team and family member has an opportunity to speak. Does not interrupt or speak over colleagues. Ensures full participation of reticent team members. Directs questions from family and carers to team members as appropriate.
Evidence of listening skills	Demonstrates appropriate communication skills. Uses active listening with colleagues, patient and family. Recognises body language signals from all participants.
Clarity of explanations to patient and family	Provides patient and family/carer with information appropriate to the level of understanding. Where appropriate, sensitively explains language used by less-experienced multidisciplinary team (MDT) colleagues.
Problem-solving skills	Identifies problems that may impede rehabilitation, discharge planning, etc. Applies creative thinking approaches to propose solutions to issues. Influences others to adopt change.
Dealing with uncertainty, conflict or ethical issues	Recognises issues that present practical, moral or ethical problems to the MDT or the patient and family/carer. Promotes open discussion of the issues. Mediates appropriate solutions that satisfy all participants. Remains within relevant clinical and ethical guidelines.
Ability to sum up agreed actions (and production of minutes if appropriate)	Accurately represents the opinions and plans of all participants of the conference. Checks understanding of outcome of all participants. (If appropriate, prepares an accurate set of minutes in a timely fashion).

Matrix of competencies identified during training			
	At end of foundation <i>Contributes to case conference</i>	At end of core medical training <i>May lead case conference</i>	At end of training (CCT award) <i>Leads conference expertly</i>
Setting the scene, introductions and agenda	Introduced self correctly and contributed to meeting	Ensured that all participants are introduced and welcomed; set out agenda for meeting	Exemplary preparation with a clear agenda and purpose for the meeting
Multidisciplinary teamwork and facilitation of team members	Recognised roles of team members in the rehabilitation process	Encouraged all team members to participate appropriately	Appeared fully briefed about each team member's contribution; substituted for absent team members
Evidence of listening skills	Listened to proceedings and contributed at appropriate intervals	Actively listened to all participants	Had full understanding of everything said and unsaid during the case conference
Clarity of explanations to patient and family	Succinctly presented medical information, avoiding the use of jargon	Clearly explained medical issues, answered questions from patients and family with awareness of limitations of knowledge	Full command of all information, not just medical; included discussion of prognosis
Problem-solving skills	Identified medical issues and dealt with simple issues	Handled straightforward medical problems arising from the case conference	Led on finding creative solutions to problems
Deals with uncertainty, conflict or ethical issues	Recognised practical, moral or ethical issues	Identified issues during case conference and sought resolution	Dealt with ethical and moral issues confidently; was able to handle issues regarding uncertainty of prognosis
Able to sum up agreed actions (and produce minutes if appropriate)	Summarised medical jobs at end of meeting (for minutes, as appropriate)	Accurately described medical plan at end of meeting that links with other team members' contributions	Full and accurate summary (and minutes) of actions from meeting comprising contributions from all team members