

Understanding Care-Planning Meetings

What these meetings are, who attends, and how to make the most of your time

What Is a Care-Planning Meeting?

A care-planning meeting is a scheduled discussion between your loved one's care team and family about current needs, goals, and the plan for meeting them. In nursing homes, these meetings are federally required; in assisted living, home health, or hospital settings, they may be called a care conference, interdisciplinary team (IDT) meeting, or discharge planning meeting.

Setting	Who typically attends
Nursing home	Nurse, social worker, dietitian, activities director, physician or nurse practitioner (as needed), resident and family
Assisted living	Executive director or care coordinator, nursing staff, family; physician input is often gathered separately
Hospital / rehab	Discharge planner or case manager, physical/occupational therapy, physician, family
Home health	Case manager or nurse, therapy staff if involved, family or primary caregiver

How often are they held?

Nursing homes are generally required to hold a care-planning meeting within about two weeks of admission, and to review the plan at least quarterly or whenever there's a significant change in condition. Assisted living communities vary by state and by facility — ask directly what their schedule is.

How to Prepare Beforehand

- ☐ Ask for the meeting date and time in advance, and request to attend by phone if you can't be there in person
- ☐ Review your own notes on recent changes: falls, mood, appetite, sleep, medication side effects
- ☐ Write down your top 3–5 questions or concerns so they don't get lost in the discussion
- ☐ Ask whether your loved one's current care plan or most recent assessment can be shared ahead of time
- ☐ Loop in other family members beforehand so the group is aligned on priorities

Questions Worth Asking

- What are the current care goals, and have they changed since the last meeting?
- Has there been any decline or improvement in mobility, cognition, mood, or nutrition?
- Are current medications, therapies, or interventions working as intended?
- What is triggering any recent falls, skin issues, weight change, or behavioral changes?

- What additional services (therapy, specialist referral, equipment) might help?
- How will the team notify our family of changes between meetings?
- What can our family do to support the plan at home or during visits?

Know your rights

- You generally have the right to participate in care-planning meetings, to request one outside the regular schedule if there's a significant change, and to receive a copy of the written care plan. Ask the facility's social worker or ombudsman if you're unsure how to exercise these rights.

After the Meeting

- Ask for a written copy of the updated care plan, or take detailed notes if one isn't provided
- Share key updates with other family members and caregivers involved
- Follow up in writing (email is often best) on any open items or unresolved concerns
- Put the next meeting date on your calendar, and note what to watch for in the meantime

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