

Interdisciplinary team meeting notes and shared plan

A meeting note with a plan summary by discipline, shared strategies and an action list.

therapycrm.io

Client reference

Meeting date

Meeting lead

Note taker

Attendees (name and discipline)

Family priorities for this period, in the family's words

Shared plan summary by discipline

Discipline	Active goal	Progress since last meeting	Concerns or changes	Review date

Shared strategies and resources

Strategies the team will use the same way across rooms and staff

Scheduling and resource needs (visit changes, rooms, equipment)

Decisions and actions

Decision or action	Owner	Due	Done

Family communication and next meeting

What will be shared with the family, by whom and when

Next meeting date and items each discipline will bring

Reviewed by

Date

This note records one meeting. Each clinician keeps and amends their own treatment plan under the clinic's review policy.