



Case Presentation Template

The Case presentation should be concise, presenting only known relevant information and generally including:

- New Referral Existing Referral

Date First Presented:

This case is coming in front of the CCT for:

- Report** (to provide anticipatory/supportive situational awareness); or for
 Action (to request a collaborative care plan or assistance addressing a barrier/gap)

Referral Name:	
Date of Birth:	
Insurance:	
Military Service?	
Primary Care Provider and Visit History:	
Emergency Dept History (if applicable):	
Other Providers: (with whom patient/client is engaged)	
Housing Status:	
Income:	
Phone:	

Presenting medical/psychosocial issues and any significant health and social determinant status and/or history:

Care plan from earlier referrals:

CCT Meeting Date	
Referring Person and Organization	