**Case Review Checklist**

Elder Death Review Teams play a vital role in identifying systemic gaps and enhancing services for individuals whose deaths may be linked to elder abuse. Following the referral process, the team chairperson(s) will facilitate a structured review process that includes the following steps:

**Pre-Review Activities:**

Collect \**Case Referral Forms* from members and determine which case(s) will be reviewed and which meeting they will be presented.

Distribute the Medical Examiner’s report to the team via email, ensuring that personally identifiable information is limited in accordance with the NASW Code of Ethics.

Review the team’s mission, goals, and confidentiality expectations.

If the decedent was in Managed Care, invite Managed Care to attend the meeting as APS does not have access to Managed Care records once the client is deceased. Prioritize the case to ensure member recollection is current in case Managed Care is unable to attend the review.

Provide a summary of the decedent’s demographic information and general incident information utilizing the \**EDRT Meeting Summary*.

Members search their records for pertinent case information in preparation of the meeting.

Present a summary of the agencies involved in the case.

Team Chair or recorder may compile case facts early before the first case review meeting.

**Team Discussion:**

Facilitate group discussion of the case, focusing on system-level issues and potential interventions.

Using data compiled by team members, team may create a timeline.

Document data and team discussion on the \**Case Review Form.*

**Post-Review Activities:**

Document the discussion and summarize key findings and system gaps identified by the team using the \**EDRT Tracking Spreadsheet* Case Review tab.

Gather data related to potential opportunities for intervention, advocacy, and service improvement.

Team and/or Chairpersons may decide to revisit past cases if more information is discovered or if other similar cases present themselves.