



Sample Student Assistance Team (SAT) Case Management Meeting Agenda (Confidential)

Team members can build structures into the Student Assistance Program (SAP) process that promote follow-up and support. For example, Pennsylvania’s Network for Student Assistance Services provides the following guidance:

Agenda Items and Best Practices:

1. Meeting information and role identification (e.g., roles defined during the meeting include facilitator, recorder, time keeper). It’s essential that the team empower the time keeper to help them use the time allotted effectively and avoid gossip and ventilation sessions.
2. New referrals, including presenting issue, assignment of case manager, and target date for data summary
3. Existing referrals with built-in follow-up mechanisms
4. Liaison updates
5. Other business

It is recommend to schedule a SAP case management meeting at the beginning of every month. Teams can schedule separate meetings for student support planning and invite all relevant stakeholders.

Meeting Information:

Date:

Facilitator:

Recorder:

Time Keeper:



Meeting Sign-In:

Team Members & Attendees (Check if present)

<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	

Review agenda and determine whether changes are needed: (2 minutes)



1. **New student referrals:** (10 minutes)

Student's name/referral source	Referral area(s)/ barriers identified	Case manager	Caregiver Contact and Consent	Date for Initial Review (data collection finished)	Problem Solving Team (PST) Meeting Date (if needed)
			<input type="checkbox"/> Caregiver contact <input type="checkbox"/> Consent for SAP and screening for services received		<input type="checkbox"/> PST needed? Meeting Date:
			<input type="checkbox"/> Caregiver contact <input type="checkbox"/> Consent for SAP and screening for services received		<input type="checkbox"/> PST needed? Meeting Date:
			<input type="checkbox"/> Caregiver contact <input type="checkbox"/> Consent for SAP and screening for services received		<input type="checkbox"/> PST needed Meeting Date:
			<input type="checkbox"/> Caregiver contact <input type="checkbox"/> Consent for SAP and screening for services received		<input type="checkbox"/> PST needed Meeting Date:



2. Update on prior referrals/status of tasks: (15 minutes)

Student's name	Case manager	Date of Review Meeting	Goal and Progress	Is student meeting goal(s)?	If no progress, determine problem and next steps
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	



3. **Mental Health / Drug & Alcohol liaison update:** (5 minutes)

Current total participating	Issues with any referrals?	New referrals awaiting care & date of service projected

Other business, information to share, activities to plan:

Next meeting will be held on:

Facilitator:

Recorder:

Time Keeper:

Form Adapted From:

Team Initiated Problem Solving Process (TIPS) www.pbis.org/common/pbisresources
“Ideas for Improving Follow-Up & Support”, p. 5-6, CAT Data Committee document
[Pennsylvania Network for Student Assistance Services Example Team Meeting Agenda](#)