



## Practice Caseload Activity

The purpose of the following activity is to practice identifying and prioritizing patients to talk about in a caseload review. The addition of OUD to a typical collaborative care registry will necessitate understanding the impact of OUD-specific treatment markers and how to weigh their importance versus mental health treatment markers. This exercise will help develop that knowledge base to support efficient data review and patient prioritization.

### Instructions:

1. Look at the CMTS “Active Patients” list below.
2. Identify **4 patients** you would want to prioritize for a weekly caseload review, using points below as a guide.
3. With your team member, compare the patients you each identified for prioritization. If different, discuss why you chose to prioritize that patient.
4. If you have time, look at the rest of the patients on the caseload and discuss what’s going on with them: Who is not engaging or having other difficulties? Who is ready for a Recovery Support Plan and the end of this episode of care?

### CHAMP Systematic Caseload Review: Things to Consider

1. Identify patients presenting with acute safety risks.
2. Identify patients who may be out of their Medications for Opioid Use Disorder (MOUD).
3. Identify patients with high Opioid Treatment Response Inventory (OTRI) scores.
4. Identify patients facing challenges to OUD treatment adherence.
5. Identify patients with no contact with a BHCM in the past 2 weeks.
6. Identify patients with significantly elevated PHQ scores.
7. Identify patients who have been in treatment for 10+ weeks without significant improvement.
8. Identify patients without a psychiatric consultation note, and a PHQ and/or GAD score above 10, or OTRI score of 1 or above.
9. Identify patients who are ready for recovery support planning, as indicated by:
  - OTRI score less than 1, over past 8 weeks
  - PHQ score less than 10
  - GAD score less than 10, or 5 points improved from first score
  - PCL-5 score over 33, or a 15-point reduction from baseline



Report run on 3/31/2021

ACTIVE PATIENTS													Report for: [BH Care Manager / MOUD Prescriber / Psychiatric Consultant / PCP / Clinic]									
													Report created on: 3/31/2021									
													CHAMP INTERVENTION									
Pt ID	Status	Wks in Tx	BH Care Management						PHQ-9		GAD-7		OTRI-4	MOUD						Urine Drug Screen		
			Last CM Encounter	# CM Encounters	Last P/N	Next Appt	BA Contacts	CM No Show Rate	First	Last	First	Last		Initiation Date	Last Prescriber Encounter	Prescriber No Show Rate	Rx	Days Prescribed	Last Reported Adherence	Rx	Illicit Opioids	Other Illicit Substance
1	T	6	3/29/21	6	1/24/21	4/12/21	100%		17	10*	7	5	0	1/20/21	3/28/21	0%	Suboxone 16mg/4mg	14	Y	Y	N	N
2	T	20	3/14/21	8	2/7/21	4/17/21	50%	25%	10	4	10	4*	2	11/25/20	3/15/21	10%	Suboxone 8mg/2mg	14	Y	Y	Y	Y
3	T	2	3/24/21	2		4/1/21		0%	12	12	8	7	4	3/24/21	3/24/21	0%	suboxone 6mg/1mg	7	N	Y	Y	Y
4	T	15	10/24/20	8	3/12/21	4/4/21	100%	10%	15	20*	10	15*	0	12/14/20	3/24/21	0%	suboxone 12mg/3mg	30	Y	Y	N	N
5	T	3	3/30/21	5	3/21/21	4/10/21		0%	15	22	12	13	3	3/13/21	3/24/21	0%	Suboxone 16mg/4mg	7	N	Y	Y	Y
6	T	11	3/25/21	10	2/15/21	4/8/21	33%	20%	15	8	14	9	0	1/14/21	3/24/21	20%	suboxone 24mg/6mg	14	N	Y	N	N
7	T	1	3/29/21	1		4/5/21			21		17		3	3/29/21	3/29/21		Suboxone 16mg/4mg	7	Y		Y	Y
8	RSP	22	3/15/21	12	1/12/21	4/17/21	75%	20%	22	7	19	3	1	10/30/20	3/29/21	0%	suboxone 6mg/1mg	30	Y	Y	N	N
9	T	16	3/20/21	7	3/7/21		50%	15%	18	15	16	3	2	11/8/20	2/26/21	15%	suboxone 12mg/3mg	30	N	N	Y	N

**Key**

\* Score in the Last column will have an asterisk (\*) if it is older than the specifications for that clinical measure; 30 days for both the PHQ-9 & GAD-7.

Last PHQ-9	Red: 10 or above <i>and</i> has not improved 50% from baseline	Last GAD-7	Red: 10 or above <i>and</i> has not improved 5 points from baseline
	Yellow: 5-9 <i>or</i> has improved 50+% from baseline		Yellow: 5-9 <i>or</i> has improved 5+ points from baseline
	Green: 4 or below		Green: 4 or below



## CHAMP CMTS Key

Column Heading	Column Description
<b>Patient ID</b>	Unique registry patient identifier, is not PHI
<b>Weeks in Tx</b>	Number of weeks since the first Care Manager Encounter in the current episode of care until today.
<b>Last CM Encounter</b>	Date of most recent Care Manager encounter
<b># CM Encounters</b>	Number of Care Manager Encounters in the current episode of care, excluding those marked as no contact.
<b>Last P/N</b>	Date of most recent Psychiatric Consultation Note.
<b>Next Appt</b>	Next appointment scheduled with any provider. Appointments will show red if the next appointment for the patient is past due and there is not a note entered on or after the next appointment date.
<b>BA Contacts</b>	Percentage of appointments that had at least one BA activity checked during the past 90 days. BH Care Manager Encounters with BA / Total BH Care Manager Encounters, excluding those marked as "no session".
<b>CM No Show Rate</b>	Percentage of appointments that were missed during the past 90 days. No Shows / (Total BH Care Manager Encounters + No Shows).
<b>PHQ-9</b>	First and last PHQ-9 scores.
<b>GAD-7</b>	First and last GAD-7 scores.
<b>OTRI-4</b>	Last OTRI-4 Score Count of positive responses in the most recent Opioid Treatment Response Inventory. Red: One or more item was answered Yes. (Count of positive responses is 1-4) Green: No items were answered Yes. (Count of positive responses is 0)
<b>Initiation Date</b>	First MOUD Encounter date from the current episode of care.
<b>Last Prescriber Encounter</b>	Date of most recent MOUD Prescriber Encounter note.
<b>Prescriber No Show Rate</b>	Percentage of appointments that were missed during the past 90 days. No Shows / (Total MOUD Prescriber Encounters + No Shows).
<b>MOUD Rx</b>	Last recorded Medication for OUD name and daily dose. MOUD information will not be displayed if the prescription was discontinued on the most recent MOUD Prescriber Encounter.
<b>MOUD Days Prescribed</b>	Number of days of medication prescribed at the last MOUD Prescriber Encounter. Patient is due for a follow-up MOUD Prescriber Encounter after this period of days.
<b>Last Reported Adherence</b>	Mouse over the Y/N to see details about missed more/missed less. MOUD information will not be displayed if the prescription was discontinued on the most recent MOUD Prescriber Encounter.
<b>UDS - Rx</b>	List whether prescribed medication for OUD was present in most recent urine drug screen results.
<b>UDS - Illicit Opioids</b>	List whether illicit (non-prescribed) opioids were present in most recent urine drug screen results.
<b>UDS - Other Illicit Substance</b>	List whether other illicit (non-prescribed) substance was present in most recent urine drug screen results, not including cannabis or alcohol.