

Guide to Preparing for Systematic Caseload Review

Instructions: These prompts are intended to help a behavioral health care manager (BHCM) prepare for systematic caseload review (SCR).

- Reflect on any new updates to your system/clinic or workflows and prepare to share with your psychiatric consultant.
- Identify patient cases to consider bringing to SCR by reviewing the registry for the following:

Quick Reference: SCR Agenda Outline

1. Brief Check-in on Clinic/System Updates (2-3 min)
2. Set Agenda, Choose Priority Patients (2-3 min)
3. Conduct Individual Case Consultations (40-45 min)
4. Brief Updates on Past Items (5-10 min)
5. Celebrate Successes & Wrap-up (5 min)
6. Confirm Date & Time of Next SCR Session

Case Prioritization Criteria
Patients with high PHQ/GAD scores and no recent review (> 4-8 weeks)
Patients with current safety concerns or flagged for consultation
Patients with poor engagement in care (e.g., no follow-up for 4+ weeks)
Patients whose score indicates worsening symptoms
Newly enrolled patients who have not been reviewed and have a diagnostic or treatment question
Improved patients ready for relapse prevention planning
Patients with a PCP that is requesting a case consultation

- Prioritize 5-7 of the identified cases. Jot down preparation notes with concerns/questions and why you would like to discuss each case.
- Identify patients who have improved, transitioned to relapse prevention, or successfully completed an episode of Collaborative Care. Prepare to briefly share about and celebrate these successes!
- Consider if there are other things to discuss if there is extra time. Some ideas: growing your caseload or caseload turnover, patient or PCP engagement strategies, or targeted education on clinical topics.
- Check the date/time of the next SCR session.