

Agenda Template for Systematic Caseload Review

Instructions: This job aid is for behavioral health care managers (BHCMS) to use to manage time and take notes during a 60-minute systematic caseload review (SCR) session with their psychiatric consultant.

Preparation Notes

Quick Reference: Case Prioritization Criteria

Patients with:

- High PHQ/GAD scores & no consultation in > 4-8 weeks
- Current safety concerns or flagged for consultation
- Low engagement in care (e.g., no follow-up for > 4 weeks)
- Score(s) indicating worsening symptoms
- A consult request from a PCP

Patients that:

- Are newly enrolled and have not been reviewed *and* have a diagnostic or treatment question
- Are improved and ready for relapse prevention

Agenda

- Brief Check-in, as needed (2-3 min)** Discuss system, clinic, or workflow changes.
- Set Agenda (2-3 min)**
Come to consensus on patients to discuss during the session.
- Conduct Individual Case Consultations (40-45 min)**
 - Each BHCM case presentation ~1-2 min
 - Each consultation ~ 4-8 min (can vary based on case complexity)

Prioritized Patients

Action Planning and Next Steps

- Brief Updates (5-10 min)** Follow-up on previous recommendations and plan to address barriers, if any.

Patient Name

Action Planning and Next Steps

- Celebrate Successes & Wrap-up (5 min.)** Share about patients who have improved, transitioned to relapse prevention, or successfully completed an episode of care. Review action items and next steps. If time remains, consider discussing growing caseload, patient or PCP engagement strategies, or education on clinical topics.

- Confirm date & time of next SCR session:** _____