



# Optimizing the Systematic Case Review Tool

March 3<sup>rd</sup> 2021



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# Disclosure

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The Michigan Center for Clinical Systems Improvement (MiCCSI), Michigan Institute for Care Management and Transformation (MICMT), and Michigan Collaborative Care Implementation Support Team (MCCIST) have been contracted by Blue Cross Blue Shield of Michigan for this project.

# Virtual Etiquette

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## Video and Audio

- Please mute your microphone unless you are speaking
  - Minimize background noise when speaking
  - Use either phone or computer audio, but not both
- Test your video and audio before the meeting begins.
- Try to look at the camera when talking (to mimic the feeling of in-person eye contact).

Use the chat box to ask questions during the presentation, our team will moderate the session

# Learning Goals

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- Understand the required and recommended components of a systematic case review tool
- Learn how to effectively utilize the data aggregated by the SCR tool to optimize clinical performance and service delivery



# Agenda

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- Review the required and recommended components of an SCR tool
- Discuss how to optimize the SCR tool for clinical activities including:
  - Weekly systematic case review
  - Daily care management activities
  - Clinical Supervision
- **Discuss how to optimize the SCR tool during program review to monitor the following areas:**
  - Clinical performance
  - Fidelity and program drift
  - Financial performance

# Poll

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- 1) What is the platform of your SCR Tool?
- 2) Are you using a temporary or permanent tool?
  
- 3) What are you hoping to learn today?  
(Please enter into chat)

# Systematic Case Review Tool

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- Caseload management tool which collects and organizes data of CoCM patients
- Key functions include:
  - Tracking clinical outcomes across enrolled patients
  - Tracking individual patient progress
  - Ensuring timely treatment to target
  - Tracking patient engagement
  - Facilitating efficient systematic caseload reviews with psychiatric consultant
- Fields should be 'sortable'

## [Systematic Case Review Tool Development Guide](#)



# How is the SCR tool used?

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- The primary use of a systematic case review tool is to aggregate and organize data collected within the CoCM program to facilitate weekly SCR
- This data is also an invaluable tool to 1) facilitate care management activities, 2) guide clinical supervision, 3) promote quality assurance & improvement during program meetings



# Data Components of an SCR Tool

## Required

- Patient identifier
- Treatment status (e.g., active, inactive, relapse prevention)
- Date of enrollment and disenrollment
- Baseline and follow-up outcome measure scores (PHQ-9 and/or GAD-7) and dates
- Date of BHCM follow-up contacts with patient

## Optional

- Overall change in PHQ-9 and/or GAD-7 scores
- Most recent change in PHQ-9 and/or GAD-7 scores (i.e., difference in two most recent scores)
- BHCM contact frequency (e.g., one-week, one month) or next contact date
- Date of most recent systematic case review
- Outstanding psychiatric treatment recommendations
- Flags to 1) discuss in SCR; 2) visualize patients whose condition is improving or worsening; and 3) to indicate patients who would benefit from contact, updated outcome measures, or SCR session

# Systematic Case Review Tool

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | 4                 | -6                              | 0                    | 12/11/20                  | 11               | 3                 | -7                              | 12/11/20                  | 1/11/21                              |                 |                                 |                        |
| Burt                | Active             | 9/22/20                 | 12/7/20                     | 3                                    | 22                 | 1/6/21                | 16                  | 15                | 0                               | 0                    | 12/7/20                   | 14               | 12                | -2                              | 12/7/20                   | 11/2/20                              |                 | Attn Needed                     |                        |
| Ernie               | Active             | 10/4/20                 | 2/15/21                     | 10                                   | 21                 | 3/17/21               | 19                  | 12                | -2                              | 0                    | 2/8/21                    | 15               | 10                | 0                               | 2/8/21                    | 2/8/21                               |                 |                                 |                        |
| Cookie Monster      | Active             | 10/12/20                | 2/7/21                      | 6                                    | 20                 | 3/9/21                | 13                  | 10                | -1                              | 0                    | 2/7/21                    | 13               | 10                | -3                              | 2/7/21                    | 2/7/21                               |                 |                                 |                        |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | 1/16/21                              |                 |                                 |                        |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | 1/11/21                              |                 |                                 |                        |
| Rosita              | Active             | 10/25/20                | 2/15/21                     | 7                                    | 18                 | 3/17/21               | 24                  | 7                 | -9                              | 0                    | 2/15/21                   | 17               | 8                 | -6                              | 2/15/21                   | 2/8/21                               |                 |                                 |                        |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | 2                               | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | 1/11/21                              |                 | Attn Needed                     |                        |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                        |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                        |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | 4                               | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | 11/23/20                             |                 | Attn Needed                     |                        |

# Systematic Case Review Tool: Required Data Components

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | 4                 | -6                              | 0                    | 12/11/20                  | 11               | 3                 | -7                              | 12/11/20                  | 1/11/21                              |                 |                                 |                        |
| Burt                | Active             | 9/22/20                 | 12/7/20                     | 3                                    | 22                 | 1/6/21                | 16                  | 15                | 0                               | 0                    | 12/7/20                   | 14               | 12                | -2                              | 12/7/20                   | 11/2/20                              |                 | Attn Needed                     |                        |
| Ernie               | Active             | 10/4/20                 | 2/15/21                     | 10                                   | 21                 | 3/17/21               | 19                  | 12                | -2                              | 0                    | 2/8/21                    | 15               | 10                | 0                               | 2/8/21                    | 2/8/21                               |                 |                                 |                        |
| Cookie Monster      | Active             | 10/12/20                | 2/7/21                      | 6                                    | 20                 | 3/9/21                | 13                  | 10                | -1                              | 0                    | 2/7/21                    | 13               | 10                | -3                              | 2/7/21                    | 2/7/21                               |                 |                                 |                        |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | 1/16/21                              |                 |                                 |                        |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | 1/11/21                              |                 |                                 |                        |
| Rosita              | Active             | 10/25/20                | 2/15/21                     | 7                                    | 18                 | 3/17/21               | 24                  | 7                 | -9                              | 0                    | 2/15/21                   | 17               | 8                 | -6                              | 2/15/21                   | 2/8/21                               |                 |                                 |                        |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | 2                               | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | 1/11/21                              |                 | Attn Needed                     |                        |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                        |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                        |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | 4                               | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | 11/23/20                             |                 | Attn Needed                     |                        |

# Systematic Case Review: Optional Data Components

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                 |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                         |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-----------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|-------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs. |
| Zoot                | Active             | 2/15/21                 | 2/15/21                     | 1                                    | 2                  | 3/1/21                | 12                  |                   |                                 | 1                    | 2/15/21                   | 14               |                 |                                 | 2/15/21                   |                                      |                 |                                 |                         |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | ▶ 4                             | 0                    | 2/1/21                    | 13               | 13              | 0                               | 2/1/21                    | ▶ 11/23/20                           |                 | Attn Needed                     |                         |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | ▶ 2                             | 0                    | 2/6/21                    | 17               | 12              | -3                              | 2/6/21                    | ▶ 1/11/21                            |                 | Attn Needed                     |                         |
| Rowlf the Dog       | Active             | 1/17/21                 | 2/12/21                     | 4                                    | 6                  | ▶ 2/26/21             | 12                  | 14                | ▶ 2                             | 0                    | 2/12/21                   | 10               | 12              | ▶ 2                             | 2/12/21                   | 2/3/21                               |                 |                                 |                         |
| Burt                | Active             | 9/22/20                 | ▶ 12/7/20                   | 3                                    | 22                 | ▶ 1/6/21              | 16                  | 15                | 0                               | 0                    | ▶ 12/7/20                 | 14               | 12              | -2                              | ▶ 12/7/20                 | ▶ 11/2/20                            |                 | Attn Needed                     |                         |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8               | -1                              | 2/7/21                    | ▶ 1/11/21                            |                 |                                 |                         |
| Rizzo the Rat       | Active             | 1/4/21                  | 2/15/21                     | 4                                    | 8                  | 3/1/21                | 15                  | 15                | 0                               | 0                    | 2/15/21                   | 14               | 14              | ▶ 1                             | 2/15/21                   | ▶ 1/11/21                            |                 | Attn Needed                     |                         |
| Cookie Monster      | Active             | 10/12/20                | 2/7/21                      | 6                                    | 20                 | 3/9/21                | 13                  | 10                | -1                              | 0                    | 2/7/21                    | 13               | 10              | -3                              | 2/7/21                    | 2/7/21                               |                 |                                 |                         |
| Gonzo               | Active             | 12/20/20                | 2/5/21                      | 4                                    | 10                 | ▶ 2/19/21             | 21                  | 20                | -1                              | 3                    | ▶ 1/11/21                 | 19               | 19              | 0                               | ▶ 1/11/21                 | ▶ 1/24/21                            |                 | Attn Needed                     |                         |
| Ernie               | Active             | 10/4/20                 | 2/15/21                     | 10                                   | 21                 | 3/17/21               | 19                  | 12                | -2                              | 0                    | 2/8/21                    | 15               | 10              | 0                               | 2/8/21                    | 2/8/21                               |                 |                                 |                         |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5               | 0                               | 2/11/21                   | ▶ 1/16/21                            |                 |                                 |                         |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | ▶ 2/17/21             | 14                  | 10                | -2                              | 0                    | ▶ 1/11/21                 | 10               | 7               | -2                              | ▶ 1/11/21                 | ▶ 1/17/21                            |                 |                                 |                         |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | ▶ 2/23/21             | 14                  | 10                | -2                              | 0                    | ▶ 1/11/21                 | 12               | 8               | -4                              | ▶ 1/11/21                 | ▶ 1/10/21                            |                 |                                 |                         |

# Systematic Case Review: Optional Data Components

| Patient Information |                  | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Burt                | Active           | 9/22/20                 | 12/7/20                     | 3                                    | 22                 | 1/6/21                | 16                  | 15                | 0                               | 0                    | 12/7/20                   | 14               | 12                | -2                              | 12/7/20                   | 11/2/20                              |                 | Attn Needed                     |                        |
| Pepe the King Prawn | Active           | 1/3/21                  | 1/24/21                     | 3                                    | 8                  | 2/7/21                | 16                  | 12                | -4                              | 0                    | 1/24/21                   | 21               | 18                | -3                              | 1/24/21                   | 1/30/21                              |                 | Attn Needed                     |                        |
| Julia               | Active           | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                        |
| Gonzo               | Active           | 12/20/20                | 2/5/21                      | 4                                    | 10                 | 2/19/21               | 21                  | 20                | -1                              | 3                    | 1/11/21                   | 19               | 19                | 0                               | 1/11/21                   | 1/24/21                              |                 | Attn Needed                     |                        |
| Miss Piggie         | Active           | 12/8/20                 | 2/6/21                      | 5                                    | 11                 | 2/20/21               | 16                  | 10                | -6                              | 0                    | 1/23/21                   | 12               | 10                | -2                              | 1/23/21                   | 1/17/21                              |                 | Attn Needed                     |                        |
| Two-Headed Monster  | Active           | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                        |
| Swedish Chef        | Active           | 1/17/21                 | 2/9/21                      | 3                                    | 6                  | 2/23/21               | 24                  | 19                | -5                              | 0                    | 1/31/21                   | 19               | 18                | -1                              | 1/31/21                   | 2/9/21                               |                 |                                 |                        |
| Rowlf the Dog       | Active           | 1/17/21                 | 2/12/21                     | 4                                    | 6                  | 2/26/21               | 12                  | 14                | 2                               | 0                    | 2/12/21                   | 10               | 12                | 2                               | 2/12/21                   | 2/3/21                               |                 |                                 |                        |
| Scooter             | Active           | 12/27/20                | 2/12/21                     | 4                                    | 9                  | 2/26/21               | 15                  | 12                | -3                              | 0                    | 1/16/21                   | 21               | 17                | -4                              | 1/16/21                   | 1/24/21                              |                 | Attn Needed                     |                        |
| Animal              | Active           | 2/1/21                  | 2/12/21                     | 4                                    | 4                  | 2/26/21               | 24                  | 21                | -3                              | 3                    | 2/12/21                   | 19               | 16                | #####                           | 2/12/21                   | 2/1/21                               |                 |                                 |                        |
| Kermit the Frog     | Active           | 12/6/20                 | 1/29/21                     | 4                                    | 12                 | 2/28/21               | 17                  | 15                | -2                              | 0                    | 1/3/21                    | 14               | 10                | -4                              | 1/3/21                    | 1/16/21                              |                 | Attn Needed                     |                        |
| Zoot                | Active           | 2/15/21                 | 2/15/21                     | 1                                    | 2                  | 3/1/21                | 12                  |                   |                                 | 1                    | 2/15/21                   | 14               |                   |                                 | 2/15/21                   |                                      |                 |                                 |                        |
| Rizzo the Rat       | Active           | 1/4/21                  | 2/15/21                     | 4                                    | 8                  | 3/1/21                | 15                  | 15                | 0                               | 0                    | 2/15/21                   | 14               | 14                | 1                               | 2/15/21                   | 1/11/21                              |                 | Attn Needed                     |                        |
| Abby Cadabby        | Active           | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | 4                               | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | 11/23/20                             |                 | Attn Needed                     |                        |
| Murray Monster      | Active           | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 17                  | 11                | -4                              | 0                    | 2/1/21                    | 17               | 14                | 1                               | 2/1/21                    | 1/16/21                              |                 |                                 |                        |

# Systematic Case Review: Optional Data Components

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | ▶ 4                             | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | ▶ 11/23/20                           |                 | Attn Needed                     |                        |
| Burt                | Active             | 9/22/20 ▶               | 1/19/21                     | 5                                    | 22                 | ▶ 2/18/21             | 16                  | 11                | -2                              | 0                    | ▶ 1/19/21                 | 14               | 10                | -2                              | ▶ 1/19/21                 | ▶ 12/20/20                           |                 |                                 |                        |
| Fozzie Bear         | Active             | 12/13/20 ▶              | 1/19/21                     | 4                                    | 11                 | 3/8/21                | 16                  | 9                 | -3                              | 0                    | ▶ 1/11/21                 | 17               | 7                 | -3                              | ▶ 1/11/21                 | ▶ 1/5/21                             |                 |                                 |                        |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | ▶ 2/23/21             | 14                  | 10                | -2                              | 0                    | ▶ 1/11/21                 | 12               | 8                 | -4                              | ▶ 1/11/21                 | ▶ 1/10/21                            |                 |                                 |                        |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | ✔ 4               | -6                              | 0                    | ▶ 12/11/20                | 11               | ✔ 3               | -7                              | ▶ 12/11/20                | ▶ 1/11/21                            |                 |                                 |                        |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | ▶ 1/11/21                            |                 |                                 |                        |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | ▶ 2                             | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | ▶ 1/11/21                            |                 | Attn Needed                     |                        |
| Rizzo the Rat       | Active             | 1/4/21                  | 2/15/21                     | 4                                    | 8                  | 3/1/21                | 15                  | 15                | 0                               | 0                    | 2/15/21                   | 14               | 14                | ▶ 1                             | 2/15/21                   | ▶ 1/11/21                            |                 | Attn Needed                     |                        |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | ▶ 1/16/21                            |                 |                                 |                        |
| Murray Monster      | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 17                  | 11                | -4                              | 0                    | 2/1/21                    | 17               | 14                | ▶ 1                             | 2/1/21                    | ▶ 1/16/21                            |                 |                                 |                        |
| Kermit the Frog     | Active             | 12/6/20 ▶               | 1/29/21                     | 4                                    | 12                 | ▶ 2/28/21             | 17                  | 15                | -2                              | 0                    | ▶ 1/3/21                  | 14               | 10                | -4                              | ▶ 1/3/21                  | ▶ 1/16/21                            |                 | Attn Needed                     |                        |

# Systematic Case Review: Optional Data Components

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                         |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|-------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs. |
| Ernie               | Active             | 10/4/20                 | 2/15/21                     | 10                                   | 21                 | 3/17/21               | 19                  | 12                | -2                              | 0                    | 2/8/21                    | 15               | 10                | 0                               | 2/8/21                    | 2/8/21                               |                 |                                 | Pending                 |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | 4                 | -6                              | 0                    | 12/11/20                  | 11               | 3                 | -7                              | 12/11/20                  | 1/11/21                              |                 |                                 |                         |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | 1/16/21                              |                 |                                 |                         |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | 1/11/21                              |                 |                                 |                         |
| Rosita              | Active             | 10/25/20                | 2/15/21                     | 7                                    | 18                 | 3/17/21               | 24                  | 7                 | -9                              | 0                    | 2/15/21                   | 17               | 8                 | -6                              | 2/15/21                   | 2/8/21                               |                 |                                 |                         |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | 2                               | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | 1/11/21                              |                 | Attn Needed                     |                         |
| Cookie Monster      | Active             | 10/12/20                | 2/7/21                      | 6                                    | 20                 | 3/9/21                | 13                  | 10                | -1                              | 0                    | 2/7/21                    | 13               | 10                | -3                              | 2/7/21                    | 2/7/21                               |                 |                                 |                         |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                         |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                         |
| Burt                | Active             | 9/22/20                 | 1/19/21                     | 5                                    | 22                 | 2/18/21               | 16                  | 11                | -2                              | 0                    | 1/19/21                   | 14               | 10                | -2                              | 1/19/21                   | 12/20/20                             |                 |                                 |                         |

# Systematic Case Review: Optional Data Components

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                         |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|-------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs. |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | 4                 | -6                              | 0                    | 12/11/20                  | 11               | 3                 | -7                              | 12/11/20                  | 1/11/21                              |                 |                                 |                         |
| Kermit the Frog     | Active             | 12/6/20                 | 1/29/21                     | 4                                    | 12                 | 2/28/21               | 17                  | 15                | -2                              | 0                    | 1/3/21                    | 14               | 10                | -4                              | 1/3/21                    | 1/16/21                              |                 | Attn Needed                     |                         |
| Gonzo               | Active             | 12/20/20                | 2/5/21                      | 4                                    | 10                 | 2/19/21               | 21                  | 20                | -1                              | 3                    | 1/11/21                   | 19               | 19                | 0                               | 1/11/21                   | 1/24/21                              |                 | Attn Needed                     |                         |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                         |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                         |
| Fozzie Bear         | Active             | 12/13/20                | 1/19/21                     | 4                                    | 11                 | 3/8/21                | 16                  | 9                 | -3                              | 0                    | 1/11/21                   | 17               | 7                 | -3                              | 1/11/21                   | 1/5/21                               |                 |                                 |                         |
| Scooter             | Active             | 12/27/20                | 2/12/21                     | 4                                    | 9                  | 2/26/21               | 15                  | 12                | -3                              | 0                    | 1/16/21                   | 21               | 17                | -4                              | 1/16/21                   | 1/24/21                              |                 | Attn Needed                     |                         |
| Burt                | Active             | 9/22/20                 | 1/19/21                     | 5                                    | 22                 | 2/18/21               | 16                  | 11                | -2                              | 0                    | 1/19/21                   | 14               | 10                | -2                              | 1/19/21                   | 12/20/20                             |                 |                                 |                         |
| Miss Piggie         | Active             | 12/8/20                 | 2/6/21                      | 5                                    | 11                 | 2/20/21               | 16                  | 10                | -6                              | 0                    | 1/23/21                   | 12               | 10                | -2                              | 1/23/21                   | 1/17/21                              |                 | Attn Needed                     |                         |
| Pepe the King Prawn | Active             | 1/3/21                  | 1/24/21                     | 3                                    | 8                  | 2/7/21                | 16                  | 12                | -4                              | 0                    | 1/24/21                   | 21               | 18                | -3                              | 1/24/21                   | 1/30/21                              |                 | Attn Needed                     |                         |
| Swedish Chef        | Active             | 1/17/21                 | 2/9/21                      | 3                                    | 6                  | 2/23/21               | 24                  | 19                | -5                              | 0                    | 1/31/21                   | 19               | 18                | -1                              | 1/31/21                   | 2/9/21                               |                 |                                 |                         |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | 4                               | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | 11/23/20                             |                 | Attn Needed                     |                         |
| Murray Monster      | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 17                  | 11                | -4                              | 0                    | 2/1/21                    | 17               | 14                | 1                               | 2/1/21                    | 1/16/21                              |                 |                                 |                         |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | 2                               | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | 1/11/21                              |                 | Attn Needed                     |                         |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | 1/11/21                              |                 |                                 |                         |

# Care Management Activities

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The BHCM can utilize the systematic case review tool to sort through caseload to prioritize care management activities including:

- Preparing for systematic case review
- Contacting patients, establishing contact frequency
- Administering outcomes measures
- Following-up on outstanding psychiatric recommendations

[Case Presentation Template – New Patient](#)

[Case Presentation Template – Established Patient](#)

# Care Management Activities: Prepping for SCR

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | ▶ 4                             | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | ▶ 11/23/20                           |                 | Attn Needed                     |                        |
| Burt                | Active             | 9/22/20                 | ▶ 1/19/21                   | 5                                    | 22                 | ▶ 2/18/21             | 16                  | 11                | -2                              | 0                    | ▶ 1/19/21                 | 14               | 10                | -2                              | ▶ 1/19/21                 | ▶ 12/20/20                           |                 |                                 |                        |
| Fozzie Bear         | Active             | 12/13/20                | ▶ 1/19/21                   | 4                                    | 11                 | 3/8/21                | 16                  | 9                 | -3                              | 0                    | ▶ 1/11/21                 | 17               | 7                 | -3                              | ▶ 1/11/21                 | ▶ 1/5/21                             |                 |                                 |                        |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | ▶ 2/23/21             | 14                  | 10                | -2                              | 0                    | ▶ 1/11/21                 | 12               | 8                 | -4                              | ▶ 1/11/21                 | ▶ 1/10/21                            |                 |                                 |                        |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | ✔ 4               | -6                              | 0                    | ▶ 12/11/20                | 11               | ✔ 3               | -7                              | ▶ 12/11/20                | ▶ 1/11/21                            |                 |                                 |                        |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | ▶ 1/11/21                            |                 |                                 |                        |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | ▶ 2                             | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | ▶ 1/11/21                            |                 | Attn Needed                     |                        |
| Rizzo the Rat       | Active             | 1/4/21                  | 2/15/21                     | 4                                    | 8                  | 3/1/21                | 15                  | 15                | 0                               | 0                    | 2/15/21                   | 14               | 14                | ▶ 1                             | 2/15/21                   | ▶ 1/11/21                            |                 | Attn Needed                     |                        |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | ▶ 1/16/21                            |                 |                                 |                        |
| Murray Monster      | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 17                  | 11                | -4                              | 0                    | 2/1/21                    | 17               | 14                | ▶ 1                             | 2/1/21                    | ▶ 1/16/21                            |                 |                                 |                        |
| Kermit the Frog     | Active             | 12/6/20                 | ▶ 1/29/21                   | 4                                    | 12                 | ▶ 2/28/21             | 17                  | 15                | -2                              | 0                    | ▶ 1/3/21                  | 14               | 10                | -4                              | ▶ 1/3/21                  | ▶ 1/16/21                            |                 | Attn Needed                     |                        |

# Care Management Activities: Following Up With Patients

| Patient Information |                  | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Burt                | Active           | 9/22/20                 | 12/7/20                     | 3                                    | 22                 | 1/6/21                | 16                  | 15                | 0                               | 0                    | 12/7/20                   | 14               | 12                | -2                              | 12/7/20                   | 11/2/20                              |                 | Attn Needed                     |                        |
| Pepe the King Prawn | Active           | 1/3/21                  | 1/24/21                     | 3                                    | 8                  | 2/7/21                | 16                  | 12                | -4                              | 0                    | 1/24/21                   | 21               | 18                | -3                              | 1/24/21                   | 1/30/21                              |                 | Attn Needed                     |                        |
| Julia               | Active           | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                        |
| Gonzo               | Active           | 12/20/20                | 2/5/21                      | 4                                    | 10                 | 2/19/21               | 21                  | 20                | -1                              | 3                    | 1/11/21                   | 19               | 19                | 0                               | 1/11/21                   | 1/24/21                              |                 | Attn Needed                     |                        |
| Miss Piggie         | Active           | 12/8/20                 | 2/6/21                      | 5                                    | 11                 | 2/20/21               | 16                  | 10                | -6                              | 0                    | 1/23/21                   | 12               | 10                | -2                              | 1/23/21                   | 1/17/21                              |                 | Attn Needed                     |                        |
| Two-Headed Monster  | Active           | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                        |
| Swedish Chef        | Active           | 1/17/21                 | 2/9/21                      | 3                                    | 6                  | 2/23/21               | 24                  | 19                | -5                              | 0                    | 1/31/21                   | 19               | 18                | -1                              | 1/31/21                   | 2/9/21                               |                 |                                 |                        |
| Rowlf the Dog       | Active           | 1/17/21                 | 2/12/21                     | 4                                    | 6                  | 2/26/21               | 12                  | 14                | 2                               | 0                    | 2/12/21                   | 10               | 12                | 2                               | 2/12/21                   | 2/3/21                               |                 |                                 |                        |
| Scooter             | Active           | 12/27/20                | 2/12/21                     | 4                                    | 9                  | 2/26/21               | 15                  | 12                | -3                              | 0                    | 1/16/21                   | 21               | 17                | -4                              | 1/16/21                   | 1/24/21                              |                 | Attn Needed                     |                        |
| Animal              | Active           | 2/1/21                  | 2/12/21                     | 4                                    | 4                  | 2/26/21               | 24                  | 21                | -3                              | 3                    | 2/12/21                   | 19               | 16                | #####                           | 2/12/21                   | 2/1/21                               |                 |                                 |                        |
| Kermit the Frog     | Active           | 12/6/20                 | 1/29/21                     | 4                                    | 12                 | 2/28/21               | 17                  | 15                | -2                              | 0                    | 1/3/21                    | 14               | 10                | -4                              | 1/3/21                    | 1/16/21                              |                 | Attn Needed                     |                        |
| Zoot                | Active           | 2/15/21                 | 2/15/21                     | 1                                    | 2                  | 3/1/21                | 12                  |                   |                                 | 1                    | 2/15/21                   | 14               |                   |                                 | 2/15/21                   |                                      |                 |                                 |                        |
| Rizzo the Rat       | Active           | 1/4/21                  | 2/15/21                     | 4                                    | 8                  | 3/1/21                | 15                  | 15                | 0                               | 0                    | 2/15/21                   | 14               | 14                | 1                               | 2/15/21                   | 1/11/21                              |                 | Attn Needed                     |                        |
| Abby Cadabby        | Active           | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | 4                               | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | 11/23/20                             |                 | Attn Needed                     |                        |
| Murray Monster      | Active           | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 17                  | 11                | -4                              | 0                    | 2/1/21                    | 17               | 14                | 1                               | 2/1/21                    | 1/16/21                              |                 |                                 |                        |

# Care Management Activities: Administering Outcome Measures

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | 4                 | -6                              | 0                    | 12/11/20                  | 11               | 3                 | -7                              | 12/11/20                  | 1/11/21                              |                 |                                 |                        |
| Burt                | Active             | 9/22/20                 | 12/7/20                     | 3                                    | 22                 | 1/6/21                | 16                  | 15                | 0                               | 0                    | 12/7/20                   | 14               | 12                | -2                              | 12/7/20                   | 11/2/20                              |                 | Attn Needed                     |                        |
| Ernie               | Active             | 10/4/20                 | 2/15/21                     | 10                                   | 21                 | 3/17/21               | 19                  | 12                | -2                              | 0                    | 2/8/21                    | 15               | 10                | 0                               | 2/8/21                    | 2/8/21                               |                 |                                 |                        |
| Cookie Monster      | Active             | 10/12/20                | 2/7/21                      | 6                                    | 20                 | 3/9/21                | 13                  | 10                | -1                              | 0                    | 2/7/21                    | 13               | 10                | -3                              | 2/7/21                    | 2/7/21                               |                 |                                 |                        |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | 1/16/21                              |                 |                                 |                        |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | 1/11/21                              |                 |                                 |                        |
| Rosita              | Active             | 10/25/20                | 2/15/21                     | 7                                    | 18                 | 3/17/21               | 24                  | 7                 | -9                              | 0                    | 2/15/21                   | 17               | 8                 | -6                              | 2/15/21                   | 2/8/21                               |                 |                                 |                        |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | 2                               | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | 1/11/21                              |                 | Attn Needed                     |                        |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                        |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                        |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | 4                               | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | 11/23/20                             |                 | Attn Needed                     |                        |

# Care Management Activities: Following up on PC Recs.

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                         |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|-------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs. |
| Ernie               | Active             | 10/4/20                 | 2/15/21                     | 10                                   | 21                 | 3/17/21               | 19                  | 12                | -2                              | 0                    | 2/8/21                    | 15               | 10                | 0                               | 2/8/21                    | 2/8/21                               |                 |                                 | Pending                 |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | 4                 | -6                              | 0                    | 12/11/20                  | 11               | 3                 | -7                              | 12/11/20                  | 1/11/21                              |                 |                                 |                         |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | 1/16/21                              |                 |                                 |                         |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | 1/11/21                              |                 |                                 |                         |
| Rosita              | Active             | 10/25/20                | 2/15/21                     | 7                                    | 18                 | 3/17/21               | 24                  | 7                 | -9                              | 0                    | 2/15/21                   | 17               | 8                 | -6                              | 2/15/21                   | 2/8/21                               |                 |                                 |                         |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | 2                               | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | 1/11/21                              |                 | Attn Needed                     |                         |
| Cookie Monster      | Active             | 10/12/20                | 2/7/21                      | 6                                    | 20                 | 3/9/21                | 13                  | 10                | -1                              | 0                    | 2/7/21                    | 13               | 10                | -3                              | 2/7/21                    | 2/7/21                               |                 |                                 |                         |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                         |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                         |
| Burt                | Active             | 9/22/20                 | 1/19/21                     | 5                                    | 22                 | 2/18/21               | 16                  | 11                | -2                              | 0                    | 1/19/21                   | 14               | 10                | -2                              | 1/19/21                   | 12/20/20                             |                 |                                 |                         |

# Systematic Case Review

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Use the systematic case review tool to review the caseload

- Discuss specific questions from PCPs or patients
- Discuss patients that are:
  - Newly enrolled in CoCM services
  - Not improving or have severe outcome measure scores
  - Not recently discussed with the psychiatric consultant
  - Not engaging in care
  - Improving, in remission, ready for relapse prevention planning, or disenrollment

# Systematic Case Review: Reviewing the Tool

| Patient Information |                    | Contact Information     |                             |                                      |                    |                       | Depression Outcomes |                   |                                 |                      |                           | Anxiety Outcomes |                   |                                 |                           | Psychiatric Panel Review Information |                 |                                 |                        |
|---------------------|--------------------|-------------------------|-----------------------------|--------------------------------------|--------------------|-----------------------|---------------------|-------------------|---------------------------------|----------------------|---------------------------|------------------|-------------------|---------------------------------|---------------------------|--------------------------------------|-----------------|---------------------------------|------------------------|
| Name                | Treatment Status   | Date of Initial Contact | Date of Most Recent Contact | Number of Patient Contacts Completed | Weeks in Treatment | Date Next Contact Due | Initial PHQ-9       | Most Recent PHQ-9 | Difference in Most Recent PHQ-9 | Most Recent PHQ-9 #9 | Date of Most Recent PHQ-9 | Initial GAD-7    | Most Recent GAD-7 | Difference in Most Recent GAD-7 | Date of Most Recent GAD-7 | Date of Most Recent Panel Review     | Flag to Discuss | Patients Not Improving at 8 Wks | Outstanding Psych Recs |
| Big Bird            | Relapse Prevention | 9/18/20                 | 2/8/21                      | 7                                    | 23                 | 5/9/21                | 11                  | 4                 | -6                              | 0                    | 12/11/20                  | 11               | 3                 | -7                              | 12/11/20                  | 1/11/21                              |                 |                                 |                        |
| Burt                | Active             | 9/22/20                 | 12/7/20                     | 3                                    | 22                 | 1/6/21                | 16                  | 15                | 0                               | 0                    | 12/7/20                   | 14               | 12                | -2                              | 12/7/20                   | 11/2/20                              |                 | Attn Needed                     |                        |
| Ernie               | Active             | 10/4/20                 | 2/15/21                     | 10                                   | 21                 | 3/17/21               | 19                  | 12                | -2                              | 0                    | 2/8/21                    | 15               | 10                | 0                               | 2/8/21                    | 2/8/21                               |                 |                                 |                        |
| Cookie Monster      | Active             | 10/12/20                | 2/7/21                      | 6                                    | 20                 | 3/9/21                | 13                  | 10                | -1                              | 0                    | 2/7/21                    | 13               | 10                | -3                              | 2/7/21                    | 2/7/21                               |                 |                                 |                        |
| Count von Count     | Active             | 10/13/20                | 2/11/21                     | 7                                    | 19                 | 3/13/21               | 11                  | 10                | -2                              | 0                    | 2/11/21                   | 9                | 5                 | 0                               | 2/11/21                   | 1/16/21                              |                 |                                 |                        |
| Zoe                 | Relapse Prevention | 10/18/20                | 2/7/21                      | 7                                    | 19                 | 5/8/21                | 5                   | 5                 | 0                               | 0                    | 2/7/21                    | 12               | 8                 | -1                              | 2/7/21                    | 1/11/21                              |                 |                                 |                        |
| Rosita              | Active             | 10/25/20                | 2/15/21                     | 7                                    | 18                 | 3/17/21               | 24                  | 7                 | -9                              | 0                    | 2/15/21                   | 17               | 8                 | -6                              | 2/15/21                   | 2/8/21                               |                 |                                 |                        |
| Grover              | Active             | 12/1/20                 | 2/6/21                      | 7                                    | 16                 | 3/8/21                | 10                  | 12                | 2                               | 0                    | 2/6/21                    | 17               | 12                | -3                              | 2/6/21                    | 1/11/21                              |                 | Attn Needed                     |                        |
| Julia               | Active             | 11/6/20                 | 2/3/21                      | 6                                    | 16                 | 2/17/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 10               | 7                 | -2                              | 1/11/21                   | 1/17/21                              |                 |                                 |                        |
| Two-Headed Monster  | Active             | 11/15/20                | 2/9/21                      | 6                                    | 15                 | 2/23/21               | 14                  | 10                | -2                              | 0                    | 1/11/21                   | 12               | 8                 | -4                              | 1/11/21                   | 1/10/21                              |                 |                                 |                        |
| Abby Cadabby        | Active             | 11/21/20                | 2/1/21                      | 5                                    | 14                 | 3/3/21                | 8                   | 12                | 4                               | 0                    | 2/1/21                    | 13               | 13                | 0                               | 2/1/21                    | 11/23/20                             |                 | Attn Needed                     |                        |

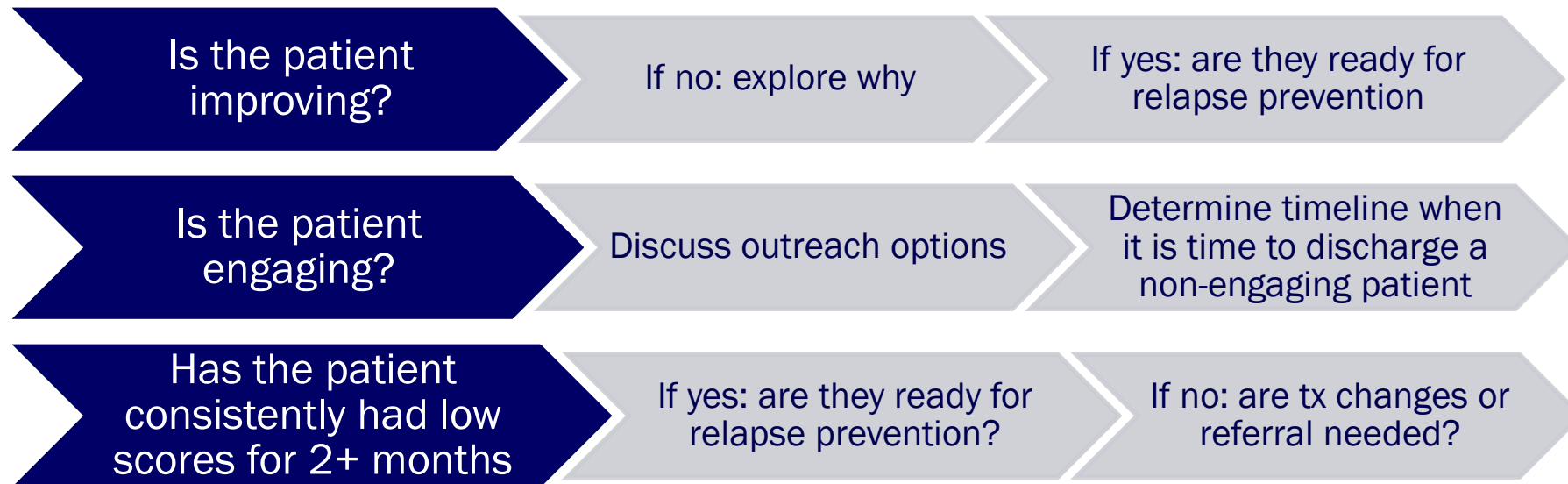


# Clinical Supervision

Use the systematic case review tool to conduct a high-level clinical review of the caseload

- Evaluate caseload volume, acuity, and needs
- Evaluate BHCM productivity, capacity for ongoing patient engagement
- Review enrollment data
- Review outcomes data

## Clinical Supervision Meeting Guide





# Program Performance Review Meeting

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Review program reports for quantitative information on program performance

- Review patient outcomes data
- Review patient engagement data
- Review program fidelity measures

[Program Review Meeting Guide](#)

[Monitoring and Evaluation: Collaborative Care Programs](#)

[Fidelity Measures and Program Targets](#)

[Monitoring for Program Drift: Collaborative Care Programs](#)

# Patient Outcomes Data

- Are patient outcomes showing response to treatment and/or remission?
- Consider the mean treatment duration – a reasonable proportion of patients will observe outcome improvements after three months of enrollment. *\*This will vary based on clinic acuity.*

| Patient Outcomes Data     |                     |                   |   |   |                            |          |
|---------------------------|---------------------|-------------------|---|---|----------------------------|----------|
| Depression Outcomes       |                     |                   |   |   |                            |          |
| # of Qualifying Patients* | Mean Baseline PHQ-9 | Mean Latest PHQ-9 | Total # of Patients that Meet Any Improvement Criteria <sup>‡</sup> | Improvement Criteria (patients may meet more than one criteria) (% of Qualifying) |                            |          |
|                           |                     |                   |   | 5 Point Reduction   | 50 % Reduction or Score <5 | Score <5 |
| 22                        | 16.6                | 12.9              | 8   | 6   | 2                          | 1        |
|                           |                     |                   | 36.4%   | 27.3%   | 9.1%                       | 4.5%     |
| Anxiety Outcomes          |                     |                   |   |   |                            |          |
| # of Qualifying Patients* | Mean Baseline GAD-7 | Mean Latest GAD-7 | Total # of Patients that Meet Any Improvement Criteria <sup>‡</sup> | Improvement Criteria (patients may meet more than one criteria) (% of Qualifying) |                            |          |
|                           |                     |                   |   | 5 Point Reduction   | 50 % Reduction or Score <5 | Score <5 |
| 23                        | 15.3                | 12.1              | 5   | 3   | 3                          | 1        |
|                           |                     |                   | 21.7%   | 13.0%   | 13.0%                      | 4.3%     |

\* Qualifying patients have a baseline score (PHQ-9 or GAD-7) > 9 and have 2 or more contacts completed

<sup>‡</sup>There are three definitions for improvement: a 5 point reduction in score is clinically meaningful improvement, a 50% reduction in score or a score less than 5 is the HEDIS measure for patients demonstrating response to treatment, and a score less than 5 indicates remission

# Fidelity Measures: Patient Enrollment

- Percentage of appropriately referred patients who are enrolled following BHCM introduction to the program
  - Fidelity Target: 75% of patients
- Patients Referred, but Not Enrolled - Reason Not Enrolled:
  - Is there a common theme for why referred patients are not enrolling in the program?
  - Does the BHCM have sufficient time to contact referred patients in a timely manner?
  - Is the program being marketed in a successful manner?

| Enrollment Data                     |                             |                                     |                                   |  |   |
|-------------------------------------|-----------------------------|-------------------------------------|-----------------------------------|--|---|
| Patients Ever Referred              | Patients Pending Enrollment | Patients Referred, but Not Enrolled | Total # of Patients Ever Enrolled | CoCM-Appropriate Patients Enrolled (Baseline PHQ-9 or GAD-7 > 9) | Mean Days of Treatment (patients ever enrolled) |
| 31                                  | 2                           | 4                                   | 25                                | 24   | 90  |
| Patients Referred, but Not Enrolled |                             |                                     |                                   |  |   |
| Patients Not Enrolled               | Reason Not Enrolled         |                                     |                                   |  |   |
|                                     | Patient Declined            | PCP Declined                        | Unable to Reach                   | Different Level of Care  | Other   |
| 4                                   | 1<br>25.0%                  | 0<br>0.0%                           | 2<br>50.0%                        | 1<br>25.0%   | 0<br>0.0%                                       |

# Fidelity Measures: Patient Engagement

- Percentage of active patients with PHQ-9 or GAD-7 scores > 9 who have at least two contacts completed within the first month
  - Fidelity Target: 75% of patients
- Percentage of active patients who have at least one recorded standardized outcome measure (PHQ-9 and/or GAD-7) each month
  - Fidelity Target: 75% of patients

|  |   |    |       |
|--|---|----|-------|
| Early Contact Rate<br>(Target: 75%)                        | Percentage of patients with 2 or more contacts in the first month   | 57 | 95.0% |
|  |   | 60 |       |
| Early Outcome Measure Completion Rate<br>(Target: 75%)     | Percentage of patients* with 2 or more standardized outcome measure(s) (PHQ-9, GAD-7) completed within the first 3 months of their enrollment | 56 | 93.3% |
|  |   | 60 |       |
| Sustained Outcome Measure Completion Rate<br>(Target: 75%) | Percentage of patients* with one or more standardized outcome measure(s) completed every quarter  | 51 | 85.0% |
|  |   | 60 |       |

# Fidelity Measures: Systematic Case Review

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- Percentage of active patients reviewed in panel review within their first two weeks of enrollment
  - Fidelity Target: 90% of patients
- Percentage of psychiatric recommendations implemented (*Exclude pending recommendations*)
  - Fidelity Target: 80% of recommendations
- Reasons individual recommendations are not implemented:
  - Are common themes emerging?
  - Are PCPs providing reasons recommendations are being declined?

# Fidelity Measures: Systematic Case Review

- Percentage of patients identified within the “critical treatment window” and discussed in SCR
  - Fidelity Target: 75% of patients
  - Must be documenting
    - PHQ-9 scores and dates
    - Date of last panel review
    - Weeks in treatment

## How to capture these patients:

Only include patients that have been actively enrolled for 8 weeks

**Numerator:** Patients discussed in panel review within 30 days of when the last outcome measure was performed (if an outcome measure was performed within 4-8 weeks and patient did not show improvement) or patients discussed in panel review within 4-8 weeks (if no outcome measure was performed)

**Denominator:** Patients who are not improving (50% reduction in PHQ-9) within 4-8 weeks or who do not have an outcome measure recorded within 4-8 weeks of enrollment

# Fidelity Measures: Systematic Case Review

|  |  |    |        |
|--|--|----|--------|
| Early SCR Rate<br>(Target: 90%)                                  | Percentage of patients discussed with a psychiatric consultant in SCR within their first 2 weeks of enrollment                                 | 57 | 95.0%  |
|  |  | 60 |        |
| Critical Treatment Period<br>(5-point reduction)<br>(Target 75%) | Percentage of patients* who are not improving (5-point reduction) at 8 weeks that are discussed in SCR within 4 - 12 weeks of their enrollment | 14 | 93.3%  |
|  |  | 15 |        |
| Critical Treatment Period<br>(50% reduction)<br>(Target 75%)     | Percentage of patients* who are not improving (50% reduction) at 8 weeks that are discussed in SCR within 4 - 12 weeks of their enrollment     | 11 | 100.0% |
|  |  | 11 |        |
| Recommendation<br>Implementation Rate<br>(Target: 80%)           | Percentage of psychiatric recommendations that have been implemented<br><br>(This does not include pending recommendations)                    | 70 | 88.6%  |
|  |  | 79 |        |
| Explanation of Individual<br>Recommendations Not<br>Implemented  | Patient declined   | 4  | 44.4%  |
|  | PCP declined   | 4  | 44.4%  |
|  | Unable to reach patient  | 1  | 11.1%  |
|  | Other  | 0  | 0.0%   |

# Program Review: Monitoring Financial Performance

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Discuss current or future billing procedures.

- Is documentation appropriate for billing compliance?
- Is reimbursement being received? If not, are there certain patterns within rejections?
- Is clinical time being optimized for caseload size and staffing of the psychiatric consultant?

# Program Review: Monitoring Financial Performance

| Patient | Mar-20 | Apr-20 | May-20     | Jun-20 | July-20 | Aug-20 |
|---------|--------|--------|------------|--------|---------|--------|
| A       | 20     | 35     | 0          | 35     | 30      | 0      |
| B       | 65     | 35     | 20         | 25     | 15      | 0      |
| C       | 20     | 25     | 20         | 10     | 0       | 0      |
| D       | 70     | 50     | 40         | 10     | 5       | 20     |
| E       | 75     | 55     | 15         | 25     | 55      | 35     |
| F       | 80     | 35     | 20         | 35     | 85*     | 40     |
| G       |        | 70     | 45         | 35     | 0       | 40     |
| H       |        | 95*    | 45         | 80*    | 110**   | 65     |
| I       |        | 70     | 20         | 30     | 0       | 35     |
| J       |        |        | 60         | 60     | 30      | 30     |
| K       |        |        | 145**<br>* | 60     | 0       | 65     |

| Month         | Time Spent      | CPT Codes                       |
|---------------|-----------------|---------------------------------|
| Initial Month | ≤10 minutes     | Not billable                    |
|               | 11-35           | 99484                           |
|               | 36-85 minutes   | 99492                           |
|               | 86-115 minutes  | 99492 + 99494                   |
|               | 116-130 minutes | 99492 + 99494, quantity 2 units |
| Sub. Month(s) | ≤10 minutes     | Not billable                    |
|               | 11-30           | 99484                           |
|               | 31-75 minutes   | 99493                           |
|               | 76-105 minutes  | 99493 + 99494                   |
|               | 106-135 minutes | 99493 + 99494, quantity 2 units |

# Resources

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- [Systematic Case Review Tool Development Guide](#)
- [Clinical Supervision Meeting Guide](#)
- [Program Review Meeting Guide](#)
- [Fidelity Measures and Program Targets](#)
- [Monitoring for Program Drift: Collaborative Care Programs](#)
- [Monitoring and Evaluation: Collaborative Care Programs](#)
- [Sustainability Toolkit](#)

# Questions

# Upcoming Webinars

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## Clinical Topics

- 3/16/2021 – PC Monthly Roundtable
- \*3/17/2021 – Substance Use Disorder Webinar
- 3/18/2021 – BHCM Monthly Discussion Group
- \*4/21/2021 – Time Management/Caseload tracking

## Organization Topics

- Identifying and training staff – 3-3-2021

*\*Continuing education credits available*

# Contact Us

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## Website:

<https://mccist.org/>

<http://valuepartnerships.com/>

## Previous Webinars:

Ongoing training webinars:

Introductory PO webinars: