

Case Review: Care Manager with Psychiatric Consultant

Brief ID: Name, Age, Gender

Suicidality & Safety Concerns

- Endorsed?
- Passive (without plan or intent), active (with plan but no intent), or active with a plan and intent? If active, how imminent is safety threat and is there a safety plan in effect?
- Has the patient previously attempted suicide? If so, by what method?
- Other safety concerns

Current Behavioral Health Conditions and Symptoms

- What are current behavioral health conditions and their severity? Use scores from symptom measures.
- How are symptoms affecting functioning? Which symptoms are most problematic for patient?
- If **mood**: Depression? Bipolar? Utilizing either the MDQ or CIDI-3 bipolar screeners and always inquiring (1) about a family history of bipolar disorder or schizophrenia and (2) if the patient has previously been diagnosed with bipolar disorder. If bipolar screen is positive, the following follow-up questions are essential to ask:
 - How often do the potential hypomanic/manic episodes occur?
 - How long do the potential hypomanic/manic episodes last? hours, days, or weeks?
 - Do the potential hypomanic/ manic episodes only occur in the context of substance abuse?
- If **anxiety and other related disorders**: GAD, PTSD, OCD, panic, or social anxiety disorder?
 - If PTSD, is patient experiencing nightmares on a regular basis and what is the cause(s) of PTSD
- If **psychosis**: Are hallucinations present? If yes, are there command hallucinations? Are delusions present? If yes, what kind of delusions (e.g., paranoid vs. grandiose)?
- If **substance use**: Current use? Past use? Drug of choice? Previous CD treatment? Ongoing relapse prevention (e.g., AA or NA)?
- If **Organic**: Cognitive Disorder? Dementia? Head Injury?
- Other: ADHD? Eating Disorder? Personality Disorder?

History of Behavioral Health Conditions

- History of behavioral health problems
- History of behavioral health treatment and effectiveness of treatment
 - Medications: Type? Dosage? Efficacy? Side effects?
 - Psychotherapy: Type? Duration? Efficacy?

Psychosocial Factors

- Does the patient have a legal (e.g., felony) history?
- Is the patient homeless or does the patient have stable housing?
- Is the patient's support system limited, poor, fair, or good?
- What is the patient's employment status?
- Is the patient a victim of abuse growing up or domestic violence as an adult? (trauma history)

Medical Problems

- Body Mass Index (BMI)? Endocrine problems: Thyroid disease? Diabetes?
- Other Medical conditions? Pain? Hypertension? Seizure disorder?
- Pregnant or breastfeeding?

Current Treatment

- Medication? If yes: type, dose, efficacy, side effects
- Brief behavioral interventions/Psychotherapy
- Other therapeutic interventions (including referrals)

Goals & Questions

- Patient
- Working diagnosis
- Provisional treatment plan
- Questions you want to focus on during psychiatric consultation (e.g., engagement, diagnosis, treatment?)

