

## Case Review: Care Manager with Psychiatric Consultant

**Brief ID:** Name, Age, Gender, Race/Ethnicity, Language

### Suicidality

- 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?

### 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 **anxiety**: 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 **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 **substance use**: Current use? Past use? Drug of choice? Previous CD treatment? Ongoing relapse prevention (e.g., AA or NA)?
- Other conditions: Cognitive Disorder? Dementia? Head Injury? 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

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

### Medical Problems

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

### Current Treatment

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

### Goals & Questions

- Patient
- Team