

A systematic case review tool is an important part of the Collaborative Care model (CoCM), allowing the behavioral health care manager and psychiatric consultant to systematically monitor their caseload. The following examples highlight the recommended and required fields for a SCR tool. When possible, health centers should work toward building a tool integrating the “recommended” fields. We also encourage using flags and alerts to help guide users toward key pieces of clinical information.

Recommended Registry Fields

Patient Information		Contact Information					Depression Outcomes					Anxiety Outcomes				Psychiatr
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
Lion, Leo	Active	12/17/18	▶ 3/29/19	3	19	▶ 4/28/19	21	21	0	0	▶ 3/29/19	21	21	0	▶ 3/29/19	▶ 4/5/19
Doe, Jane	Active	4/12/19	▶ 4/22/19	3	2	▶ 4/29/19	17			0	▶ 4/12/19	19			▶ 4/12/19	▶ 4/19/19
Green, Sky	Active	12/24/18	▶ 4/17/19	6	18	▶ 5/1/19	17	5	-5	0	▶ 4/17/19	18	✔ 4	-6	▶ 4/17/19	▶ 4/17/19
Smith, John	Active	2/28/19	▶ 4/17/19	2	9	▶ 5/1/19	7	8	▶ 1	0	▶ 4/17/19	21	12	-9	▶ 4/17/19	▶ 4/19/19
Blue, Jeans	Active	4/23/19	▶ 4/23/19	1	1	▶ 5/7/19	16			0	▶ 4/23/19	19			▶ 4/23/19	▶ 4/26/19
Yellow, Joy	Active	12/31/18	▶ 4/11/19	7	17	▶ 5/11/19	19	11	0	0	▶ 4/11/19	17	21	0	▶ 4/11/19	▶ 4/12/19
Jupiter, Mars	Active	12/17/18	▶ 4/29/19	10	19	▶ 5/13/19	18	✔ 3	-7	0	▶ 4/29/19	21	8	▶ 5	▶ 4/29/19	▶ 4/12/19
Shine, Sun	Active	4/29/19	▶ 4/29/19	1	0	▶ 5/13/19	22			0	▶ 4/29/19	21			▶ 4/29/19	
Michigan, Cherry	Active	10/22/18	▶ 4/30/19	13	27	▶ 5/14/19	18	21	0	0	▶ 4/30/19	20	21	0	▶ 4/30/19	▶ 4/12/19
Smile, Big	Active	11/13/18	▶ 4/30/19	8	24	▶ 5/30/19	20	11	-7	0	▶ 4/25/19	17	10	-7	▶ 4/25/19	▶ 4/26/19

*It is also recommended to include patient MRN/ID number to assist in identifying and documenting patients.

Required Registry Fields

Patient Information			Depression Outcomes				Anxiety Outcomes		
Name	Treatment Status	Date of Initial Contact	Initial PHQ-9	Most Recent PHQ-9	Difference in Most Recent PHQ-9	Most Recent PHQ-9 #9	Initial GAD-7	Most Recent GAD-7	Difference in Most Recent GAD-7
Lion, Leo	Active	12/17/18	21	21	0	0	21	21	0
Doe, Jane	Active	4/12/19	17			0	19		
Green, Sky	Active	12/24/18	17	5	-5	0	18	✓ 4	-6
Smith, John	Active	2/28/19	7	8	▶ 1	0	21	12	-9
Blue, Jeans	Active	4/23/19	16			0	19		
Yellow, Joy	Active	12/31/18	19	11	0	0	17	21	0
Jupiter, Mars	Active	12/17/18	18	✓ 3	-7	0	21	8	▶ 5
Shine, Sun	Active	4/29/19	22			0	21		
Michigan, Cherry	Active	10/22/18	18	21	0	0	20	21	0
Smile, Big	Active	11/13/18	20	11	-7	0	17	10	-7

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