



# Systematic Case Review Outline

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## **What is it?**

A Systematic Case Review (SCR) is a brief discussion of a patient case. There is to be a prioritized review of each case which focuses on the next steps the team would like to take with each patient. These SCR's are to be repeated frequently and will involve sharing tasks among the care teams.

## **What it is not?**

An SCR is not a team huddle, a peer review or a comprehensive case review like "grand rounds".

## **When do they occur?**

Systematic Case reviews are to be scheduled with Care teams at a minimum of twice a month for (1-hour) each.

The Care Manager will schedule these out in advance with each participating care team.

## **Who participates?**

Participants in the SCR should consist of the following:

- Care Manager
- Care Coordinator – (\*Patient Navigator)
- Psychologist
- Psychiatrist
- Primary Care Physician - (\*Care Team )

\*Participate at provider/care manager discretion as needed.

## **How are the SCR's prepared?**

The site Care Manager will review the patient registry and i2i reports for BHICCI enrollee's. Based on registry findings, provider recommendations/requests and outcome measures (HbA1c, GAD7 or PHQ9) the Care Manager will select patients for the team to review in each SCR.



Two days prior to the SCR the Care Coordinator prepares the "SCR Template" paper form and reviews as completed with the Care manager. The coordinator will then prepare copies for the care team and providers to participate in the meeting. Each patients Medication list will be stapled to the paper SCR template for review. The Care Manager will provide those copies of the SCR case presentations to the participating teams.

### **What happens during the SCR?**

The Care Manager will lead in the SCR meeting to ensure appropriate flow of each patient is discussed and use an agenda template to assist in appropriate timing for each patient case. With the use of the SCR Case Presentation template form, patient medications, recent outcome measures and ranges will be discussed along with patient goals, strengths, and barriers/stressors.

The following action list will be documented for each case review:

- What is the problem?
- How will we intervene?
- Who will do that?
- When will this happen?

During the SCR the Care Coordinator is to take notes and complete the SCR template form while also keeping time.

### **How is this documented in the system?**

Once the SCR meeting is complete the Care Coordinator will take their notes and create a "Non-billable" encounter for each patient reviewed in the meeting.

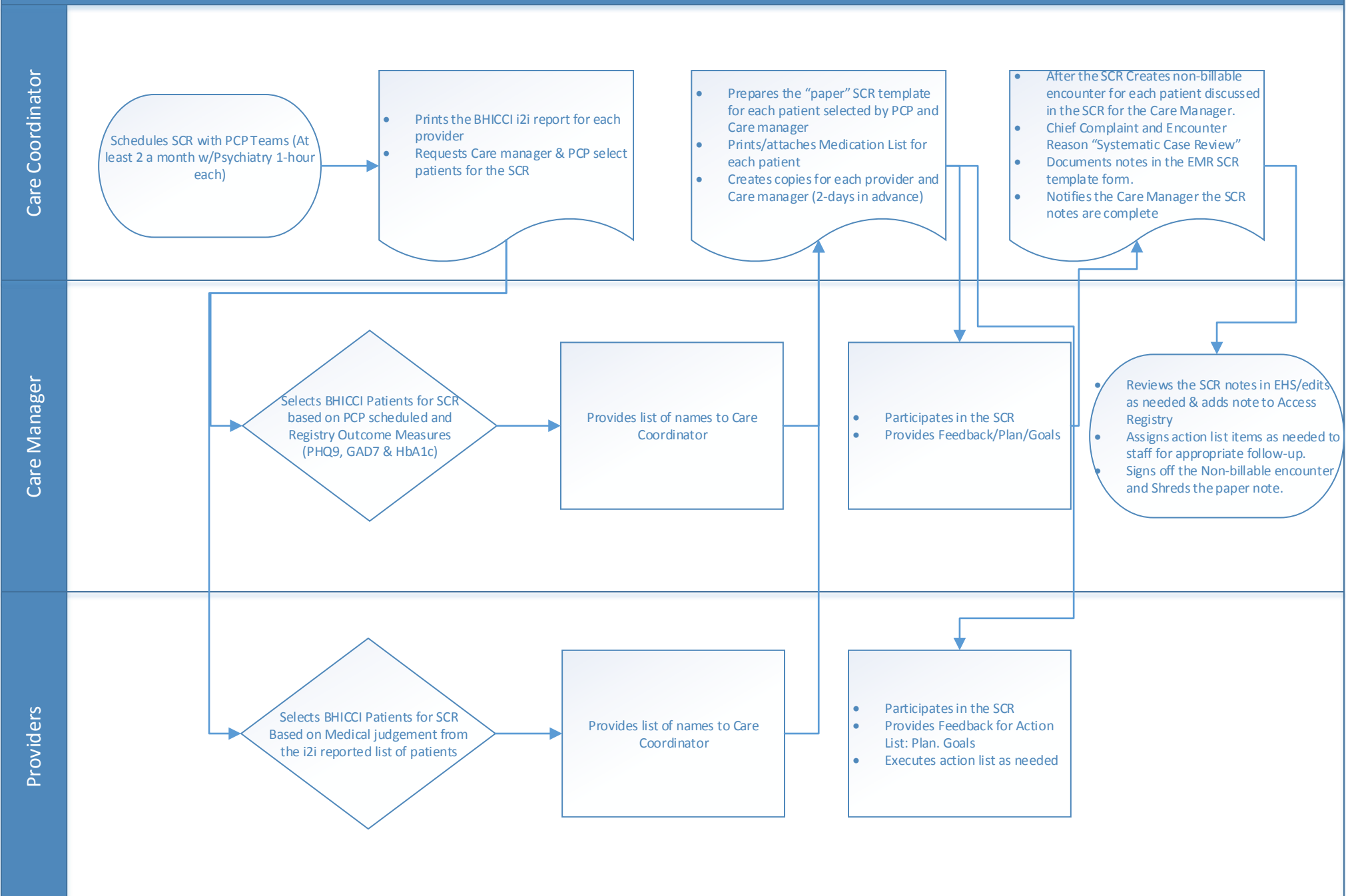
Once the non-billable is created the coordinator will select the Encounter Reason of "Systematic Case Review"

The form "systematic case review" will also be selected and the coordinator will document everything from the meeting for each patient in that template. (The SCR template in EHS has been designed to mimic the paper template.)

# Systematic Case Review (SCR Workflow)



Phase





**SCR Meeting Team "Provider Name Here"**

**AGENDA**

**XX, XX XX, 2017**

**00:00 am to 00:00 pm**

**11:30-11:35** – Introduction: Goals for Each Patient’s SCR:

- Patient Goals, Strengths & Barriers
  
- **Action List:** For each patient we need to address the following:
  - **What is the problem?**
  - **How will we intervene?**
  - **Who will intervene?**
  - **When will the intervention occur?**

<b>11:35-11:40</b>	Patient name	<input type="checkbox"/>
<b>11:40-11:45</b>	Patient name	<input type="checkbox"/>
<b>11:45-11:50</b>	Patient name	<input type="checkbox"/>
<b>11:50-11:55</b>	Patient name	<input type="checkbox"/>
<b>11:50-11:55</b>	Patient name	<input type="checkbox"/>
<b>11:55-12:00</b>	Patient name	<input type="checkbox"/>
<b>12:00-12:05</b>	Patient name	<input type="checkbox"/>
<b>12:05-12:10</b>	Patient name	<input type="checkbox"/>
<b>12:10-12:15</b>	Patient name	<input type="checkbox"/>
<b>12:15-12:20</b>	Patient name	<input type="checkbox"/>

**12:20-12:30** Review how the meeting went, what we would like to change for the next meeting and what patients if any we want to f/u on again at the next meeting.

**\*Next SCR meeting is scheduled for XX, XX XX from 00:00 am to 00:00 pm. Please have CSR block off slots for meeting.**

# SCR Case Presentation Template

PT's PCP:

PT's Psychiatrist:

PT's Psychologist:

Patient Name	MRN	Age	DOB
Ethnicity	Immigrant/Refugee Status		

Current Dx					
Substance Use: <input type="checkbox"/> Alcohol <input type="checkbox"/> Tobacco <input type="checkbox"/> Marijuana <input type="checkbox"/> Other Drugs: _____					
Last HbA1c	Last HbA1c Date	Range of HbA1c over last year	<input type="checkbox"/> BP at target	If BP not at target, last BP	Last BP Date
Statin: <input type="checkbox"/> Yes <input type="checkbox"/> No		ASA: <input type="checkbox"/> Yes <input type="checkbox"/> No		ACE or ARB: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Last BMI	Last BMI Date	Last PHQ-9		Last PHQ-9 Date	
Last GAD-7	Last GAD-7 Date	Last SU Assessment Score		Last SU Assessment Date	

Recent ER Visits/Hospitalizations
Rx

Patient Goals
Patient Strengths
Patient Stressors/Barriers

<p>Action List: <b>What</b> is the problem? <b>How</b> will we intervene? <b>Who</b> will do what? <b>When</b> will this happen?</p>
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Attendees Present at SCR:
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Complete prior to SCR

Complete during the SCR

PT's PCP:

PT's Psychiatrist:

PT's Psychologist:

# SCR Case Presentation Template

Patient Name	MRN	Age	DOB
Ethnicity	Immigrant/Refugee Status		

Current Dx

Substance Use:  Alcohol  Tobacco  Marijuana  Other Drugs:  
\_\_\_\_\_

Last HbA1c	Last HbA1c Date	Range of HbA1c over last year	<input type="checkbox"/> BP at target	If BP not at target, last BP	Last BP Date
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Statin:  Yes  No      ASA:  Yes  No      ACE or ARB:  Yes  No

Last BMI	Last BMI Date	Last PHQ-9	Last PHQ-9 Date
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Last GAD-7	Last GAD-7 Date	Last SU Assessment Score	Last SU Assessment Date
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Recent ER Visits/Hospitalizations:

Rx:

Patient Goals :

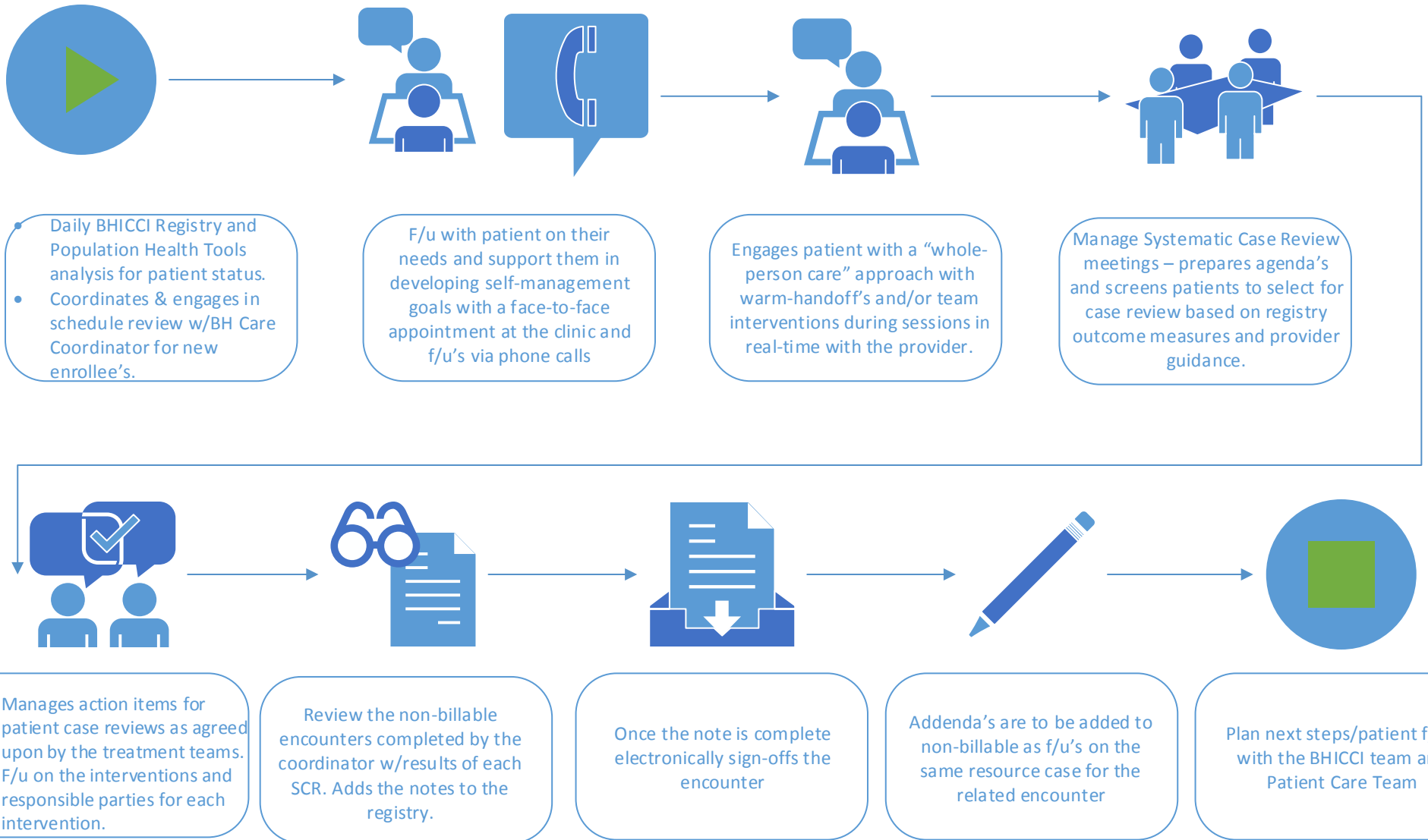
Patient Strengths:

Patient Stressors/Barriers

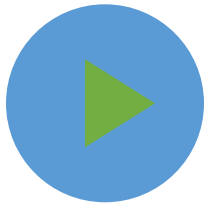
Action List: **What** is the problem? **How** will we intervene? **Who** will do what? **When** will this happen?

Attendees Present at SCR:

# BHICCI – Care Manager – Workflow



# BHICCI – Care Coordinator– Workflow



- Daily schedule analysis for potential enrollees in the BHICCI Program
- Coordinates Appts. & f/u's for BHICCI Patients with the Care Manager



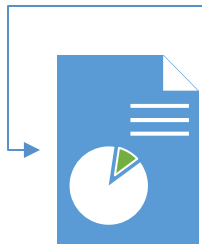
F/u with Care Manager for BHICCI enrollee's (Potential new, previously enrolled) and schedules w/Care Manager



- Updates registry for new enrollees
- Adds outcome measures for each enrolled patient-(weekly/monthly review for submission)



Schedules Systematic Case Reviews with Providers & Care Manager



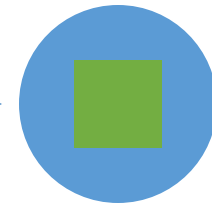
Prepares BHICCI i2i reports for Providers & once patients are selected prepares SCR "paper" Template/copies for the SCR Meeting in advance



Maintains timekeeping and notes per patient review during SCR Meetings



Documents the SCR notes in the EMR SCR template and advises the Care Manager for Review



Plan next steps/patient f/u's with Care Manager



# BHICCI - Patient Health Navigator – Workflow

