

Case-Based Exercise: Managing a Behavioral Health Workflow

Scenario

You are a behavioral health clinician in an integrated primary care clinic. You are responsible for managing a caseload of 25 active clients using a patient registry. Below is a subset of 5 clients from your caseload requiring review this week.

Patient Registry Snapshot

| Patient | Age | Key Issues | PHQ-9 (Last) | PHQ-9 (Prev) | Risk Factors | Last Visit | Notes |
|---------|-----|-------------------------|--------------|--------------|--------------------------------|-------------|-------------------------|
| A | 52 | Depression, diabetes | 18 | 14 | Passive SI, poor med adherence | 2 weeks ago | Missed last appointment |
| B | 29 | Anxiety | 6 | 10 | None | 1 week ago | Improving, engaged |
| C | 41 | Depression, alcohol use | 20 | 21 | Recent relapse | 3 weeks ago | Reports isolation |
| D | 67 | Mild depression | 8 | 7 | Chronic illness | 1 month ago | Stable, good support |
| E | 35 | PTSD | 15 | 15 | Sleep disturbance | 2 weeks ago | No improvement |

Tasks for Learners

1. Prioritization

Rank the 5 patients in order of urgency for follow-up (1 = highest priority, 5 = lowest). Explain your reasoning.

2. Clinical Decision-Making

For each patient, decide follow-up interval and type of contact (visit, phone, referral).

3. Measurement-Based Care

Identify which patients are improving, which need treatment changes, and which may be relapsing.

4. Caseload Management Strategy

Describe how you would organize a week managing 25 patients, including high-risk follow-ups and missed visits.

Facilitator Guide (Suggested Answers)

Priority example: A (highest), C, E, B, D (lowest).

Key teaching points include risk prioritization, trend monitoring, and response to missed visits.