

**Behavioral Health Case Presentation Template**

DO NOT INCLUDE ANY PATIENT IDENTIFIERS

*Please note that case consultations do not create or otherwise establish a provider-patient relationship between any Piedmont Health Services or UNC Health clinician.*

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| **Presenter name:** |  |
| **Presenter Clinical Role:** |  |
| **Clinic:** |  |

**Client information**

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| **Gender:** |  |
| **Age:** |  |
| **Ethnicity:** |  |

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| **What are your core questions about this case?***2 bullet points max* |  |
| **What are the client’s issues at this time, how are you working with them, and how is treatment going?***2-3 bullet points* |  |
| **Does your client experience symptoms that aren’t otherwise explained by a physical health diagnosis? (E.g. headaches, abdominal pain, muscle tension)***1-2 bullet points* |  |

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| **Alcohol use?** | [ ] (Y): Frequency: |
| [ ] (N) None |
| **Drug use?** | [ ] (Y): Type and frequency: |
| [ ] (N) None |

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| **Current/Past medication Hx (include psychiatric medications)** *list most relevant if more than 4* |

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| **Medication** | **Start date** | **Dosage** | **Frequency** | **Discontinued?** | **Notes/Side effects** |
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| **Current and past behavioral health history/hospitalizations** *2-3 bullet points* |

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| **Family history of mental illness** *2-3 bullet points* |

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| **Client strengths** *2-3 bullet points* |

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**Social History and Context**

*Please provide any relevant information you may have to help us understand the cultural and contextual aspects of the client’s presenting issue(s). The MECA\* elements on the right provide suggestions to guide you,* ***but don’t feel like you have to have something for every element!***

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| **Provider factors** *2-3 bullet points* | Examples of questions you could answer:* What are my contributions to this relationship? Consider personal communities of representation, power dynamics, feelings of countertransference, treatment approaches used etc.)
* What language is used in session/are interpreters used?
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| **Migration and Acculturation** *2-3 bullet points**
 | Examples of questions you could answer:* How/why/when did client immigrate to the US?
* How is client adapting to life in the US (e.g., language, culture, values)?
* How does client’s culture impact their/family’s views on behavioral healthcare?
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| **Sociocultural Context** *2-3 bullet points* | Examples of questions you could answer:* What is client’s socioeconomic/education status?
* What does client’s neighborhood look like (e.g., demographics, available resources, welcoming or not)?
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| **Family Organization** *2-3 bullet points**
 | Examples of questions you could answer:* Who does client live with in their home and what are the family dynamics (e.g., communication, authority, conflict)?
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| **Family Life Cycle** *2-3 bullet points**
 | Examples of questions you could answer:* Given client’s developmental age, what are the things we would expect them to be doing/wanting to do right now (e.g., be a parent/provider)?
* How might culture and mental health be impacting their capacity to live out these life goals?
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***\*Multidimensional Ecosystemic Comparative Approach (MECA)***