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| **IDENTIFY AND ENGAGE PATIENTS** |
| **COLLABORATIVE CARE TASKS** | **WHO**Name / Role | **HOW**Process (including handoffs / connections) & Communication Methods (e.g., EHR, in-person)) | **WHEN**Consider time constraints and patient flow | **WHERE**Front desk, lobby, exam room, provider office |
| **High-level Screening workflow** |
| Identify Patients Who May Need Treatment: Define Population of Focus |  |  |  |  |
| Screen for Behavioral Health Problems Using Valid Measures (i.e. PHQ-9, GAD-7): Implement Clinic-Wide Screening |  |  |  |  |
| **High-level Treatment Workflow (see treatment workflow tool for care managers)** |
| Diagnose Behavioral Health Disorders: Medical Provider Addresses Symptom Screener Outcome |  |  |  |  |
| Refer and Engage Patient in Collaborative Care Program through Care Team Introduction | PCP role:Nursing staff role:Care manager role: |  |  |  |
| **Needed Organization-Level Changes**□ Staff Hires□ Staff Training□ Clinical Supervision□ Administrative Supervision□ Other Resources needed | **Notes:** |