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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:** | | | |