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| **INITIATE AND PROVIDE TREATMENT** |
| **COLLABORATIVE CARE TASKS** | **WHO**Name / Role | **HOW**Process (Including handoffs / connections) &Communication Methods (e.g., EHR, in-person) | **WHEN**Consider patient flow and time constraints | **WHERE**In-clinic? Clinic location: exam room or office space? By phone? |
| Engage Patient in Care |  |  |  |  |
| Initiate Behavioral Health Assessment |  |  |  |  |
| Develop & Update Behavioral Health Treatment Plan |  |  |  |  |
| Patient Education about Symptoms & Treatment Options |  |  |  |  |
| Prescribe Psychotropic Medications | PCP role:Psych consultant role::Care manager role: |  |  |  |
| Patient Education about Medications & Side Effects |  |  |  |  |
| Brief Behavioral Interventions, Activity Scheduling, Behavioral Activation |  |  |  |  |
| Evidence-based Psychotherapy (e.g., PST, CBT, IPT) |  |  |  |  |

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| **INITIATE AND PROVIDE TREATMENT (CONTINUED)** |
| **COLLABORATIVE CARE TASKS** | **WHO**Name / Role | **HOW**Process (Including handoffs / connections) &Communication Methods (e.g., EHR, in-person) | **WHEN**Consider patient flow and time constraints | **WHERE**In-clinic? Clinic location: exam room or office space? By phone?  |
| Identify & Treat Coexisting Medical Conditions | PCP role:CM role: |  |  |  |
| Facilitate Referral to Specialty Care or Social Services |  |  |  |  |
| Create & Support Relapse Prevention Plan |  |  |  |  |
| **Needed Organization-Level Changes**□ Staff Hires□ Staff Training□ Clinical Supervision□ Administrative Supervision□ Other Resources needed | **Notes:** |

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| **TRACK TREATMENT OUTCOMES** |
| **COLLABORATIVE CARE TASKS** | **WHO**Name / Role | **HOW**Process (Including handoffs / connections) &Communication Methods (e.g., EHR, in-person) | **WHEN**Consider patient flow and time constraints | **WHERE**In-clinic? Clinic location: exam room or office space? By phone? |
| Track Treatment Engagement and Outcomes using Registry |  |  |  |  |
| Reach out to Patients who areDisengaged |  |  |  |  |
| Regularly Track Patients’ Symptoms with Measurement Tool (e.g., PHQ-9) |  |  |  |  |
| Track Medication Side Effects & Concerns |  |  |  |  |
| Track Outcome of Referrals & Other Treatments |  |  |  |  |
| **Needed Organization-Level Changes**□ Staff Hires□ Staff Training□ Clinical Supervision□ Administrative Supervision□ Other Resources needed | **Notes:** |

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| **PROACTIVELY ADJUST TREATMENT IF PATIENTS ARE NOT RESPONDING** |
| **COLLABORATIVE CARE TASKS** | **WHO**Name / Role | **HOW**Process (Including handoffs / connections) &Communication Methods (e.g., EHR, in-person) | **WHEN**Consider patient flow and time constraints | **WHERE**In-clinic? Clinic location: exam room or office space? By phone? |
| Review Registry Frequently to Assess Need for Changes in Treatment  |  |  |  |  |
| Facilitate Changes in Treatment / Treatment Plan  |  |  |  |  |
| Participate in Regular Case Review with Psychiatric Consultant |  |  |  |  |
| Develop Plan for Psychiatric Consultant Support for Challenging Patients (i.e. in-person, phone, telepsychiatry) |  |  |  |  |
| **Needed Organization-Level Changes**□ Staff Hires□ Staff Training□ Clinical Supervision□ Administrative Supervision□ Other Resources needed | **Notes:** |