### Collaborative Care Task Matrix - CBO and Primary Care Clinic

Who will do these tasks? Please mark an ‘x’ below where appropriate. Multiple people/organizations may be involved in performing the same task so it’s ok to mark multiple x’s in the same row. Note: Most but not all tasks need to be performed by someone.

#### Identify and Engage Patients with Depression in Care

- **Task 1. Identify people who may need help**
- **Task 2. Screen for depression**

#### Initiate and Provide Treatment for Depression

- **Task 3. Gather information to support a clinical assessment**
- **Task 4: Diagnose depression**
- **Task 5. Educate patient and family (as appropriate) about depression**
- **Task 6. Educate patient and family (as appropriate) about treatment options**
- **Task 7. Engage patient and family (as appropriate) in Collaborative Care for depression**
- **Task 8. Develop and initiate a treatment / care plan**
- **Task 9. Prescribe antidepressant medication if indicated**
- **Task 10. Educate patient about medications & other treatment side effects**
- **Task 11. Facilitate patient self-management support and behavioral interventions for all patients regardless of treatment modality**
- **Task 12. Provide evidence-based psychotherapy (e.g., Problem-Solving Treatment, CBT, IPT), if indicated**
- **Task 13. Provide case management or refer to social and other support services (e.g. housing, food assistance)**
- **Task 14. Provide or refer to specialty mental health services outside primary care, if indicated**

#### Track Processes of Care and Clinical Outcomes

- **Task 15. Track treatment outcomes using a registry (e.g. symptoms with measurement tool such as the PHQ-9, outcome of referrals and other treatments)**
- **Task 16. Track delivery of care management support (e.g. follow-up calls to patients, clinic appointments, case reviews by psychiatric consultant, referrals)**
- **Task 17. Reach out to patients not engaging in treatment**

#### Adjust Treatment if Patients are Not Responding

- **Task 18. Regularly check treatment response and cue providers for possible changes in treatment, if needed**
- **Task 19. Participate in regular (weekly) case review to identify patients who are not improving and provide treatment recommendations**
- **Task 20. Ensure treatment recommendations get to provider and are enacted**

#### Provide Administrative Support and Program Supervision

- **Task 21. Provide program support (e.g., scheduling, resources)**
- **Task 22. Provide program supervision**

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<thead>
<tr>
<th>Task</th>
<th>Primary Care Clinic</th>
<th>Collaborative Care Team</th>
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<tbody>
<tr>
<td></td>
<td>Patient</td>
<td>Prescribing Provider</td>
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<td>Psychiatric Consultant</td>
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<td>Other Partners</td>
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