Collaborative Care Task Matrix - CBO and Primary Care Clinic	Collaborative Care Team					
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.	Patient	Primary Care Clinic			Community-Based Ogranization	Other Partners
		Prescribing Provider (PCP)	Non-Prescribing Provider	Psychiatric Consultant		
Identify 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 about depression	☐	☐	☐	☐	☐	☐
Task 6. Educate patient about treatment options	☐	☐	☐	☐	☐	☐
Task 7. Engage patient in depression treatment	☐	☐	☐	☐	☐	☐
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., PST, CBT, IPT), if indicated	☐	☐	☐	☐	☐	☐
Task 13. Provide case management or refer to social and other support services (e.g. housing, food assistance), if indicated	☐	☐	☐	☐	☐	☐
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 the PHQ-9, outcome of referrals and other treatments)	☐	☐	☐	☐	☐	☐
Task 16. Track delivery of care management support in a registry (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	☐	☐	☐	☐	☐	☐
Task 23. Attend regular planning meetings between the CBO and primary care clinic	☐	☐	☐	☐	☐	☐