## Collaborative Care Task Matrix - Family Intervention

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 Patients with Depression in Care
- Task 1. Identify people who may need help
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐
- Task 2. Screen for depression
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐

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

### 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)
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐
- 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)
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐
- Task 17. Reach out to patients not engaging in treatment
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐

### Adjust Treatment if Patients are Not Responding
- Task 18. Regularly check treatment response and cue providers for possible changes in treatment, if needed
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐
- Task 19. Participate in regular (weekly) case review to identify patients who are not improving and provide treatment recommendations
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐
- Task 20. Ensure treatment recommendations get to provider and are enacted
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐

### Provide Administrative Support and Program Supervision
- Task 21. Provide program support (e.g., scheduling, resources)
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐
- Task 22. Provide program supervision
  - Patient: ☐
  - Primary Care Clinic: ☐
  - Non-Prescribing Provider: ☐
  - Psychiatric Consultant: ☐
  - Family Member, Friend, or Significant Other: ☐
  - Other Partners: ☐