PEARLS Task Matrix - CBO and Primary Care Clinic	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	PEARLS Providers			Primary Care Clinic	Other Partners
		PEARLS Counselor	Psychiatric Consultant	Other Staff at CBO		
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 in coordination with primary care	☐	☐	☐	☐	☐	☐
Task 9. Communicate with clinic provider and support antidepressant treatment, if antidepressant medication 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 PST/BA	☐	☐	☐	☐	☐	☐
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, 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 the PCP or other related 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	☐	☐	☐	☐	☐	☐