



Template: Initial Care Manager Assessment & Care Plan: This template and example initial assessment can guide your organization’s delivery and documentation of collaborative care. The prompts for each section can help the care manager know what to say help to structure the initial assessment and to be efficient in collecting complete assessment information. There is also a completed example of the initial care manager assessment and care plan a fictional patient for reference.

Introduction to Collaborative Care

- Thank you for working with me!
- A team will be taking care of you—but you are the captain of the ship
- Care Manager Role — assessment, offer treatment options and coach/focused psychotherapy
- Help you use tools to manage your behavioral health symptoms
- Team will communicate about your care including recommendations from psychiatric consultant
- Continue to contact Primary Care Team for all illnesses and acute problems

Patient Concerns

- When did you start feeling like this?
- Have your symptoms changed during this time?
- Have they changed recently?

Assessment

Behavioral Health History

Have you ever struggled with _____?

- Mood Symptoms
 - Depression:
 - Bipolar Disorder/Mania:
- Anxiety Symptoms/Trauma History
- Psychotic Symptoms/Hearing voices
- Substance-Use Disorder
- Other Behavioral Health Concerns

Safety Concerns

Current Safety Concerns? Flag as Safety Risk?

Prior Behavioral Health Treatment

- Inpatient Hospitalization?
- Outpatient Mental Health Treatment /Psychotherapy?
- Past Medications?
- Past Safety Concerns?

Social History

We will be getting to know each other better over time. For now, what are the important things that I should know about you?

- Education: Employment:
- Family/Culture/Childhood:
- Legal History:
- Social Supports:
- Barriers to Self-Care/basic needs:
- Living situation/Lives with:
- Employment Status:





Significant Medical Problems and History

-Tell me about your current medical problems.

Current Medications

-What are your current medications? How do you take them?

-It's hard for most of us to take medications regularly. Is that a problem for you?

Patient Goals for Treatment

Mental Status Examination

Validated Behavioral Health Measures

Summary of Problems/Provisional Diagnosis

Plan

Treatment options discussed: Schedule

follow-up:

Care Manager:

PCP:

Discuss with Psychiatric Consultant?

