

Introduction

- *Verify 2 identifiers*
- *Introduce self and role in clinic (part of PC/ PACT team)**
- *Explain how long the visit will be*
- *Explain purpose of contact, including what will happen during the visit (review/use of measures, symptom review and setting goals for care)*
- *Explain that a note from the visit will go into the medical record*
- *Explain reporting obligations (in accordance with discipline specific guidelines)**

Assess

Referral Problem

- *Identify patient perspective of problem*
- *Evaluate how presenting problem impacts patient's functioning (home, social, work, recreational, and spiritual)*

Administer/Reviews Structured Measures

- *Use/reference assessment measures appropriate to primary care (e.g., PHQ9, GAD7, PCL) and their use over time in treatment**

Past Mental Health History

- *Briefly review mental health treatment history (including medication, hospitalizations, therapy)*

Current Psychotropic Medication

- *If on psychotropic medications, ask about adherence**
- *If on psychotropic medications, ask about side effects**

Assess for Suicidal/Homicidal Ideation

- *Appropriately assess and manage risk of harm to self/others (High Risk Protocol followed when indicated)**

Summary

- *Provide summary of items assessed (including patient's perspective)*

Advise/Agree

Discuss Treatment Options

- Discuss treatment options (*explain specific, personalized options that are based in the evidence*)
- Utilize shared decision-making approach to identify initial overarching goals for treatment (based on patient interest and motivation to change)
- Agree on initial plan of care*

Assist

Patient Education and Activation

- Provide patient education and/or activation (e.g., psychoeducation, SMART goal, Behavioral Activation)

Arrange

Discuss Next Steps and Schedule Follow Up

- Let Veteran know what follows, including plans for follow-up (visits/calls)*
- Give Crisis Line and local contact information*
 - VCL number: 1-800-273-8255 (press 1)
- Ask best time to be scheduled for follow-up and schedule appts/make referrals as needed
- *Remember: Ask "Is there anything else we can do for you today?"*

PCP Feedback

Feedback

- Provide brief, focused feedback to PACT on patient's reported progress

Note: Total time to complete <30 minutes