

Step 1: Staff Self-assessment

NAME:  
ROLE/POSITION:

Tasks for Integrated Primary Care in Mental Health Settings	Is This Your Role Now?		If No, Whose Role?  Write in position title	Your Organization's Capacity with This Task?		Your Level of Comfort with This Task		Would You Like Training to Perform This Task?	
	Yes	No		High	Med/Low	High	Med/Low	Yes	No
<b>Identify and Engage Clients</b>									
Identify Clients For Primary Care Screening	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Screen for Medical Problems : Office-Based Measurement (e.g. Weight, BP, HR)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Screen for Medical Problems : Lab Measurements (e.g. HbA1C; Lipids)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess if patient receives primary care with outside PCP	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify Clients who Need Care Management	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perform Healthy Living/Health Behavior Assessment	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diagnose Medical Disorders that Need Treatment	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engage Patient in Integrated Medical Care Program	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Initiate and Provide Treatment</b>									
Facilitate Registration with Primary Care	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinate with Outside PCP/Asses Quality of Relationship	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develop and Update Primary Care Goals & Treatment Plans	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prescribe Medications for Primary Care Problems	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinate and Communicate Plans for Primary Care with Mental Health Team	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Education about Primary Care Medications & Side Effects	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Behavior Change Counseling: Smoking Cessation	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health behavior change counseling: Weight Management/Nutrition	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health behavior change counseling: Increase Physical Activity/Exercise	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilitate Referral and Coordination with Specialty Medical Care	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Track Treatment Outcomes</b>									
Track Treatment Engagement & Adherence of Medical Care using Registry	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reach out to Clients who are Non-adherent or Disengaged from Medical Care	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track Office-Based Measurement (e.g. Weight, BP, HR)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track Lab Measurements (e.g. HbA1C; Lipids)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track Required Other Measurements (ex NOMS)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track Medication Side Effects & Concerns	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track Outcome of Referrals	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess Need for Changes in Primary Care Treatment	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilitate Changes in Treatment if Client Primary Care Problems Not Improving	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide Caseload-Focused Primary Care Consultation	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide In-Person Medical Assessment of Challenging Clients	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continue to Assess for Need of Integrated Primary Care Services	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Provide Effective Program Support	Yes	No		High	Med/Low	High	Med/Low	Yes	No
Coordinate Communication Among Team Members (Both Mental Health and Primary Care)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrative Support for Medical Care Program (e.g. Scheduling, Resources, etc)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clinical Supervision for Program/Accountability for Medical Care Program Outcomes	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training of Team Members in Primary Care	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**STEP 2: AIMS TEAM BUILDING** Task Summary by Staff

Tasks for Integrated Primary Care in Mental Health Settings PLEASE MARK AN X BELOW WHERE APPROPRIATE	STAFF 1	STAFF 2	STAFF 3	STAFF 4	STAFF 5	STAFF 6	STAFF 7	PARTNER AGENCY	REFERRAL	TOTAL #	CHANGES NEEDED
NAME:											
ROLE/TITLE:											
<b>Identify and Engage Clients</b>											
Identify Clients For Primary Care Screening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Screen for Medical Problems : Office-Based Measurement (e.g. Weight, BP, HR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Screen for Medical Problems : Lab Measurements (e.g. HbA1C; Lipids)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Assess if patient receives primary care with outside PCP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Identify Clients who Need Care Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Perform Healthy Living/Health Behavior Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Diagnose Medical Disorders that Need Treatment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Engage Patient in Integrated Medical Care Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Initiate and Provide Treatment</b>											
Facilitate Registration with Primary Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Coordinate with Outside PCP/Asses Quality of Relationship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Develop and Update Primary Care Goals & Treatment Plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Prescribe Medications for Primary Care Problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Coordinate and Communicate Plans for Primary Care with Mental Health Team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Client Education about Primary Care Medications & Side Effects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Health Behavior Change Counseling: Smoking Cessation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Health behavior change counseling: Weight Management/Nutrition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Health behavior change counseling: Increase Physical Activity/Exercise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Facilitate Referral and Coordination with Specialty Medical Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Track Treatment Outcomes												
Track Treatment Engagement & Adherence of Medical Care using Registry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Reach out to Clients who are Non-adherent or Disengaged from Medical Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Track Office-Based Measurement (e.g. Weight, BP, HR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Track Lab Measurements (e.g. HbA1C; Lipids)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Track Required Other Measurements (ex NOMS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Track Medication Side Effects & Concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Track Outcome of Referrals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Assess Need for Changes in Primary Care Treatment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Facilitate Changes in Treatment if Client Primary Care Problems Not Improving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Provide Caseload-Focused Primary Care Consultation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Provide In-Person Medical Assessment of Challenging Clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Provide Effective Program Support												
Coordinate Communication Among Team Members (Both Mental Health and Primary Care)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Administrative Support for Medical Care Program (e.g. Scheduling, Resources, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Clinical Supervision for Program/Accountability for Medical Care Program Outcomes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Training of Team Members in Primary Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Notes for Discussion												

### STEP 3: AIMS TEAM BUILDING Summary & Change Plan

Identify and Engage Clients				
Tasks for Integrated Primary Care in Mental Health Settings	WHO Name / Discipline	HOW Process (Including Hand-offs) Communication Methods (e.g., telephone, mail) Billing	WHEN	WHERE
Identify Clients For Primary Care Screening				
Screen for Medical Problems : Office-Based Measurement (e.g. Weight, BP, HR)				
Screen for Medical Problems : Lab Measurements (e.g. HbA1C; Lipids)				
Assess if patient receives primary care with outside PCP				
Identify Clients who Need Care Management				
Perform Healthy Living/Health Behavior Assessment				
Diagnose Medical Disorders that Need Treatment				
Engage Patient in Integrated Medical Care Program				

<b>Needs for Implementation</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Staff Hires</li><li><input type="checkbox"/> Staff Training</li><li><input type="checkbox"/> Clinical Supervision</li><li><input type="checkbox"/> Administrative Supervision</li><li><input type="checkbox"/> Other Resources needed</li></ul>	<b>Notes:</b>
<b>Timeline:</b>	

Initiate and Provide Treatment				
Tasks for Integrated Primary Care in Mental Health Settings	WHO Name / Discipline	HOW Process (Including Hand-offs) Communication Methods (e.g., telephone, mail) Billing	WHEN	WHERE
Facilitate Registration with Primary Care				
Coordinate with Outside PCP/Asses Quality of Relationship				
Develop and Update Primary Care Goals & Treatment Plans				
Prescribe Medications for Primary Care Problems				
Coordinate and Communicate Plans for Primary Care with Mental Health Team				
Client Education about Primary Care Medications & Side Effects				
Health Behavior Change Counseling: Smoking Cessation				
Health behavior change counseling: Weight Management/Nutrition				
Health behavior change counseling: Increase Physical Activity/Exercise				

Facilitate Referral and Coordination with Specialty Medical Care				
<p>Needs for Implementation</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Staff Hires</li> <li><input type="checkbox"/> Staff Training</li> <li><input type="checkbox"/> Clinical Supervision</li> <li><input type="checkbox"/> Administrative Supervision</li> <li><input type="checkbox"/> Other Resources needed</li> </ul>	Notes:			
Timeline:				



Treatment Outcomes: Track and Adjust				
Tasks for Integrated Primary Care in Mental Health Settings	WHO Name / Discipline	HOW Process (Including Hand-offs) Communication Methods (e.g., telephone, mail) Billing	WHEN	WHERE
Track Treatment Engagement & Adherence of Medical Care using Registry				
Reach out to Clients who are Non-adherent or Disengaged from Medical Care				
Track Office-Based Measurement (e.g. Weight, BP, HR)				
Track Lab Measurements (e.g. HbA1C; Lipids)				
Track Required Other Measurements (ex NOMS)				
Track Medication Side Effects & Concerns				
Track Outcome of Referrals				
Assess Need for Changes in Primary Care Treatment				
Facilitate Changes in Treatment if Client Primary Care Problems Not Improving				
Provide Caseload-Focused Primary Care Consultation				

Provide In-Person Medical Assessment of Challenging Clients				
Continue to Assess for Need of Integrated Primary Care Services				
<p>Needs for Implementation</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Staff Hires</li> <li><input type="checkbox"/> Staff Training</li> <li><input type="checkbox"/> Clinical Supervision</li> <li><input type="checkbox"/> Administrative Supervision</li> <li><input type="checkbox"/> Other Resources needed</li> </ul>	<p>Notes:</p>			
<p>Timeline:</p>				

Provide Effective Program Support (add as needed)				
Tasks for Integrated Primary Care in Mental Health Settings	WHO Name / Discipline	HOW Process (Including Hand-offs) Communication Methods (e.g., telephone, mail) Billing	WHEN	WHERE
Coordinate Communication Among Team Members (Both Mental Health and Primary Care)				
Administrative Support for Medical Care Program (e.g. Scheduling, Resources, etc)				
Clinical Supervision for Program/Accountability for Medical Care Program Outcomes				
Training of Team Members in Primary Care				
Needs for Implementation <input type="checkbox"/> Staff Hires <input type="checkbox"/> Staff Training <input type="checkbox"/> Clinical Supervision <input type="checkbox"/> Administrative Supervision <input type="checkbox"/> Other Resources needed	Notes:			
Timeline:				