## 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 in medical record

## Assess
### Administer/Reviews Structured Measures and Results
- *Use/reference assessment measures appropriate to primary care (e.g., PHQ9, GAD7, PCL) and their use over time in treatment*

### Current Psychotropic Medication (if applicable)
- If on psychotropic medications, ask about adherence*
- If on psychotropic medications, asks about side effects*

### Assess for Suicidal/Homicidal Ideation
- Appropriately assess and manage risk of harm to self/others (High Risk Protocol followed when indicated)*

### Assess Progress Toward Goals
- Assess progress on patient identified goals from last contact*

## Advise/Agree
### Discuss Treatment Plan
- Promote adherence to plan of care
- Discuss changes in treatment plan as appropriate (e.g., at key decision points in algorithm)*
28. CM Follow Up Assessment: Training Tool

**Assist**

**Develop a Behavioral Change Plan**
- Collaboratively identify and develop a behavioral action plan that is consistent with the Veteran’s goal*

**Assist with Problem-solving and Patient Education**
- Address challenges/barriers around psychotropic medication nonadherence and/or side effects, if present
- Provide appropriate assistance with behavior change goals (e.g., motivational interviewing, problem-solving, and/or patient education)
- Provide relevant patient education (e.g., strategies to support symptom self-management and/or health and wellness education); If drinking alcohol, provide appropriate education (alcohol as depressant, interaction with medication)

**Arrange**

**Discuss Next Steps and Schedule Follow Up**
- Let Veteran know what follows, including plans for follow-up (visits/calls)*

**PCP Feedback**

**Feedback**
- Provide brief, focused feedback to PACT on patient’s reported progress

*Note: Total time to complete <30 minutes*