Chapter 13: Describing Collaborative Care to Patients

Introducing the Collaborative Care Team
This handout will help primary care providers, staff, and patients understand the roles on the Collaborative Care team. It can be helpful for providers to use the care team handout when explaining the program to patients. Because this model of delivering services is new for most patients and for primary care practices, it can be helpful to review the roles periodically with primary care providers and help guide them in how to introduce the program to patients.

You & Your Collaborative Care Team

What is your role?
You are the most important person on the team! You will get the best care if you participate actively with your primary care provider (PCP), your care manager, and your psychiatric consultant. Tell them what is working for you and what is not. Work with your team to track your progress using a simple checklist. Let them know if you have questions or concerns about your care. If you take medication, know what it is and take it as prescribed.

What is your primary care provider’s role?
Your primary care provider oversees all aspects of your care at the clinic. He or she will work closely with the other members of the care team to make sure you get the best care possible. Your PCP may write or refill prescriptions for medications and order lab tests as needed. Your PCP works closely with your care manager to stay informed about your treatment progress. Your PCP may also consult with the psychiatric consultant if there are questions about the best treatments for you.

What is your care manager’s role?
Your care manager works closely with you, your PCP, and your psychiatric consultant to implement a treatment plan. Your care manager answers questions about your treatment. He or she will follow-up with you throughout your treatment to keep track of your progress, help identify side effects if you are taking medications, and be available to answer any questions you may have. Your care manager, PCP and psychiatric consultant work closely with you if a change in your treatment is needed. Your care manager may also provide counseling or refer you for counseling if that is part of your treatment plan.

What is your psychiatric consultant’s role?
Your psychiatric consultant is an expert consultant to your PCP and care manager. Your psychiatric consultant will meet with you by video and advises your care team about diagnostic questions and treatment options, especially if you don’t improve with your initial treatment. Your care manager meets and consults regularly with your psychiatric consultant to talk about your progress and to inform your ongoing care.

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Script for the initial telephone call

1. Introduce yourself
   
   Good (morning / afternoon / evening), M(r/s)._____________________________.
   
   I am ___________________, a care manager at the ___________________ clinic.

2. Explain how you obtained the patient’s name
   
   I work with Dr. _________________, who has spoken with you about our treatment program to improve the treatment of <bipolar disorder or PTSD> in primary care.

3. Explain purpose of call (scheduling visit)
   
   I would like to schedule you to come in for a visit with me in the clinic and also set up a time for you to have a consultation with the psychiatrist.

4. Explain the nature of the initial visit
   
   During your visit with me, I want to talk a little bit more with you about some of the symptoms you have been experiencing. The information should help you and your doctor decide about whether you need treatment, and if so, what the right treatment is for your symptoms. I would also like to give you some information that tells you more about our treatment program.

5. Wait for feedback, if none, continue:
   
   Do you have any questions at this time?

6. Schedule visit if none has been scheduled
   
   When would be a good time for you to come to the clinic?
   
   (Arrange a visit time and meeting place, ideally at the patients’ usual waiting area and coordinate it with the MD/primary care clinician’s schedule so that the clinician can see the patient immediately after the visit with the CM.)

7. Explain the purpose of the psychiatric consultation
   
   As part of your treatment program, we will also have you meet with the psychiatrist for a consultation. You would meet me in the clinic, and we would meet the psychiatrist together by interactive video. This helps make sure we get the best treatment plan in place for you at the start of your care.

8. Wait for feedback, if none, continue:
   
   Do you have any questions at this time?

9. Schedule psychiatric consultation visit (this can be done at the same time as the initial care manager assessment or at another time)
   
   When would be a good time for you to come to the clinic?

10. Thank patient and provide contact telephone number
    
    Thank you very much. I look forward to meeting you on _________ (date/time). If you have any questions between now and our visit, feel free to call me at ____________________ (CM’s telephone number).