

30-Minute Follow-up Appointments

The following outline provides a behavioral health care manager (BHCM) guidance on how to structure a 30-minute follow-up appointment while continuing to cultivate a therapeutic relationship with a patient.

Prior to the Follow-Up Appointment

- At the initial assessment discuss the importance of setting an agenda for follow-up sessions. Set a standard appointment agenda with the patient to guide future appointments.
- When possible, have the patient complete the behavioral health measure, i.e. PHQ-9, at home the same day as the appointment, or in the waiting room before the appointment begins.
- If the follow-up appointment is in-clinic, greet the patient on the walk back to or as the patient settles into the office. This is an opportunity to ask a focused question about treatment. An example of this might be, “How did it go trying to get out of the house more this week?”

Follow-Up Appointment Outline

1. Greeting and Agenda Setting (5 minutes)

- Review standard appointment agenda together
- Review treatment goals and concerns
 - Ask about continuing with current treatment goals
 - Ask if there are new treatment goals to add to the agenda
 - Ask if there are any new or pressing concerns to add to the agenda
- Reach agreement on the agenda

2. Review and Provide Treatment (20 minutes)

- Review behavioral health measure scores and discuss any changes
 - BHCM to consider: is provisional diagnosis still on track?
- Address urgent patient concerns, if any
- Check in on new or current medications (if applicable)
 - How's it working? How often are they missing doses? Any side effects?
 - Address any concerns about medications or barriers to taking them consistently
- Deliver behavioral health interventions and psychotherapy, review and update treatment plan
 - Review assignments from previous session
 - Discuss progress on and practice behavioral health strategies
 - Relate these to patient goals, reinforce small gains, problem solve challenges, adjust behavioral health treatment strategies and goals (if applicable)
 - Review with the patient: do we need to intensify treatment?
 - Introduce new behavioral health interventions (if applicable)
- Check on referrals and problem solve any referral barriers (if applicable)

3. Outline Next Steps in Care (5 minutes)

- Confirm assignments for next session
 - Who is responsible for any follow-up/tasks?
 - For example, does patient have a behavioral activation goal to walk 3 times/week? Did BHCM agree to check-in with a referral source or psychiatric consultant on medications?
- Set next appointment, and assist with other clinic appointments or appointment reminders, as needed
- Provide patient with care plan and follow-up paperwork