

Appendix E: Example of a Patient Tracking Sheet

Dummy ID	Medical Record Number	Date of Visit	Date of Screening	Screen positive		Referral?				Intensive counseling?				Follow up?
				What behavioral test did patient screen positive for? 1=PHQ9>4 2=AUDIT>8 3=Both 4=don't know	What medical test did patient screen positive for? 1=BMI≥30 2=HbA1c>7 3=Both 4=don't know	If this patient's screen was "positive" did the patient receive a traditional referral? 1=Yes 2=No 3=Don't know	If this patient's screen was "positive" did the patient receive a referral with outreach? 1=Yes 2=No 3=Don't know	If this patient's screen was "positive" did the patient receive a warm handoff referral? 1=Yes 2=No 3=Don't know	If this patient's screen was "positive" did the patient receive a staff or self-referral? 1=Yes 2=No 3=Don't know	If referred, did patient receive intensive counseling from primary care clinician? 1=Yes 2=No 3= Don't know	If referred, did patient receive intensive counseling from psychiatrist? 1=Yes 2=No 3=Don't know	If referred, did patient receive intensive counseling from health coach? 1=Yes 2=No 3=Don't know	If referred, did patient receive intensive counseling from behavioral health counselor? 1=Yes 2=No 3=Don't know	
Please use the correct dummy ID for patients who screened positive	! This column is for your records only. Please maintain a copy of this number. Please do not send files with medical record numbers or patient names.	9/5/2013	8/28/2013	1	4	2	2	2	1	3	2	2	2	4
		9/19/2013	8/21/2013	1	4	2	2	2	1	3	2	2	1	2
		9/26/2013	9/20/2013	4	4	2	2	2	1	3	2	2	1	2
		9/26/2013	9/24/2013	1	4	2	2	2	1	3	2	2	1	2
		10/24/2013	10/15/2013	4	4	2	2	2	1	3	2	2	1	2
		10/24/2013	10/7/2013	1	4	2	2	2	1	1	2	2	1	2
		11/8/2013	10/17/2013	1	4	2	2	2	1	1	2	2	1	2
		11/11/2013	10/30/2013	4	4	2	2	2	1	3	3	2	1	2
		11/11/2013	11/18/2013	4	4	2	2	2	1	1	2	2	1	2
		11/12/2013	11/4/2013	4	4	2	2	2	2	3	2	1	1	2