# CM Initial Assessment: Training Tool

## Introduction
- Introduce self as part of PACT and as a service requested by PCP*
- Explain length of initial contact
- Explain purpose of contact, including role of repeated measures
- If Vet declines due to timing of contact, reschedule appointment
- Verify 2 identifiers or Release of Information checked
- Reporting obligations (in accordance with discipline specific guidelines)*

## Assess

### Referral Problem
*Identifies patient perspective of problem with functional implications assessed*

### Administer/Reviews Structured Measures
*Administers/reviews structured measures, adhering to scripts/screeners verbatim, as applicable*

*Answers clarified as needed and redirecting courteously* *

### Current Psychotropic Medication
*Reviews current psychotropic medications and assesses adherence and side effects*

### Past Mental Health History
*Assess previous mental health treatment, including medication*

### Assess for Suicidal Ideation
*Initiates high risk protocol, when indicated*
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Advise/Agree
Discuss Treatment Options

Utilize Shared Decision Making Approach to Identify Initial Goals
Agree to Plan of Care*
*Based on treatment options reviewed in advise — Veteran agrees to plan selected and is willing/motivated to engage in selected option(s)

Personal Action Plan (Assist)
Provide Psychoeducation

Arrange
Inform Veteran of Next Steps*

Preferred Time for Scheduling Follow-Up and Make Appointments/Referrals

Provide Veterans Crisis Line Information*
  - VCL Number: 1-800-273-8255 (press 1)

*indicates critical items for inclusion in competency demonstrations and key areas in your work with Veterans

Follow-Up: Give feedback to the PCP/PACT that is brief and focused after seeing the Veteran

Note: Total time to complete <30 minutes.

Remember: Ask “Is there anything else I can do for you today?”