

## SB-MHITS Initial Assessment “Cheat Sheet”

### **Patient concerns:**

*Short history of the presenting problem. Patient description of why they are seeking (or referred to) services; what’s going on in their lives.*

### **Prior mental health treatment:**

*Any services received previously (e.g., individual, family, or group counseling; medication management; mental-health focused prevention programs; etc.).*

### **Alcohol/substance abuse:**

*History of problematic use/abuse of substances including alcohol, prescription or non-prescription drugs.*

### **Prior medications:**

*History of medications (prescribed) relevant to presenting problem.*

### **Current medications:**

*Any current medications relevant to the presenting problem.*

### **Significant medical problems and history:**

*Current or past notable medical issues.*

### **Personal/social information:**

#### **Family history and cultural history:**

*Notable information related to client ethnocultural background, family relationships and norms, etc.*

#### **Peer relationships:**

*Social functioning, presence/adequacy of friendships, etc.*

#### **School Functioning:**

*Academic functioning, likelihood of grade advancement, ability to comply with the behavioral requirements of the educational setting. Information about current school schedule and specific classes in which the student may be struggling.*

#### **Legal history:**

*Any history or current involvement with the legal system.*

#### **Current supports:**

*Individuals or structures that are either currently activated to support the youth and increase his/her likelihood of success across domains or which could be.*

#### **Mental status examination:**

*Observations regarding client’s appearance, mood, affect, speech, apparent thought process and content, insight and judgment, level of engagement, orientation to the present moment, etc.*

### **Formulation:**

*Integration of the most relevant pieces of information above to describe the vulnerabilities that may have predisposed the client to develop the presenting problem, which factors precipitated its onset (stressors/events), and which factors may be maintaining current problems/distress. In addition to any specific hypotheses about the cause and nature of presenting problems, this section can provide a framework for the intervention approach and, potentially, predictions about prognosis.*