

Patient:	Age / gender:	Problem:
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Domain	Current state of affairs	Complexity level			
Illness <small>(Biomedical, mental health and substance abuse sx & dx)</small>	1. Symptom severity / functional impairment 0=No symptoms—or reversible w/out intense efforts 1=Mild noticeable sx—don't interfere w function 2=Mod to severe symptoms that interfere w function 3=Severe symptoms impairing all daily functions	0	1	2	3
	2. Diagnostic challenge 0=Diagnosis(s) clear 1=Narrow range of alternative diagnoses 2=Multiple possibilities—clear dx expected later 3=Multiple possibilities—no clear dx expected	0	1	2	3
Readiness to engage	3. Distress, distraction, preoccupation 0=None 1=Mild, e.g. tense, distractible, preoccupied 2=Moderate, e.g. anxiety, mood, confusion 3=Severe w behavioral disturbances, e.g., harm	0	1	2	3
	4. Readiness for treatment and change 0=Ready & interested in tx; active cooperation 1=Unsure/ambivalent but willing to cooperate 2=Major disconnect with proposed tx; passivity 3=Major disconnect; defiant/won't negotiate	0	1	2	3
Social	5. Home/residential safety, stability 0=Safe, supportive, stable 1=Safe, stable, but with dysfunction 2=Safety/stability questionable—evaluate/assist 3=Unsafe/unstable—immediate change required	0	1	2	3
	6. Participation in social network 0=Good participation with family, work, friends 1=Restricted participation in 1 of those domains 2=Restricted participation in 2 of those domains 3=Restricted participation in 3 of those domains	0	1	2	3
Health system	7. Organization of care 0=One active main provider (medical or MH) 1=More than or less than 1 active provider(s) 2=Multiple medical / MH providers or services 3=Plus major involv. with other service systems	0	1	2	3
	8. Patient-clinician (or team) relationships 0=All appear intact and cooperative 1=Most intact; at least 1 distrustful or remote 2=Several distrustful or remote; at least 1 intact 3=Distrust evident in all pt / clinician relationships	0	1	2	3
Resources for care	9. Shared language with providers 0=Shared fluency in language with provider 1=Some shared language / culture with provider 2=No shared language; professional transl. available 3=No shared language; family or no translator	0	1	2	3
	10. Adequacy / consistency of insurance for care 0=Adequately insured, can pay for meds, copays 1=Under-insured* with modest other resources 2=Under-or intermittently-insured 3=Uninsured, no other financ. resources for care	0	1	2	3

Instructions:
As you gather information and listen to the patient,

- Scan for sources of complexity (interference with usual care) on the left.
- Ask questions that help you understand what you don't know.
- Circle a level that reflects your understanding of complexity in each area.
- Outline a plan of action that takes into account the observed pattern of complexity

Plan of action:
General goals:
(for both complexity and diagnosis)

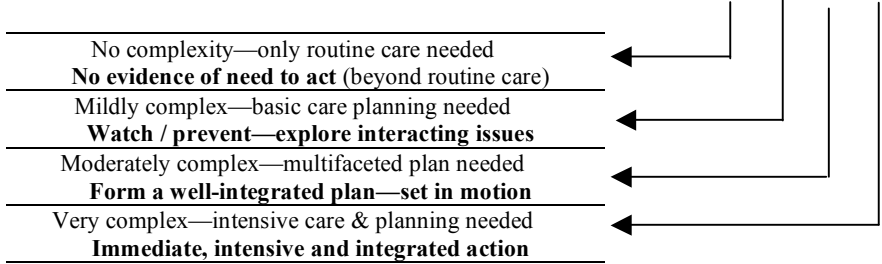
Self-check: Do I need someone in this case with me—and who?

Team / roles required:
(who does what—how it adds up)

Patient / family role:
(as part of the team)

What clinician / team will do today:
(To act on both complexity & diagnosis)

*Underinsured: Lack of coverage for hospital, medications, mental health; presence of high deductibles /copays



With all your ratings in view, decide what level and kind of action is needed in what areas—and incorporate that into your action plan.