

MENTAL HEALTH
C&P EXAM GUIDE

What the examiner records, how to prepare, and what to do after the appointment



THE EXAM IS AN EVIDENCE-GATHERING APPOINTMENT

The examiner documents diagnosis, history, symptoms, and occupational and social impairment. The examiner does not make the final rating decision.

THE EXAM FLOW

WHAT USUALLY HAPPENS

01

RECORD REVIEW

The examiner may review service records, treatment, prior exams, statements, and other evidence in the claim file.

02

CLINICAL INTERVIEW

Questions cover history, current symptoms, treatment, functioning, and relevant events.

03

MENTAL STATUS FINDINGS

The examiner records observed behavior, communication, orientation, thought process, memory, mood, and related findings.

04

DBQ AND OPINION

The report identifies diagnoses, symptoms, impairment, and any requested medical opinion.

BEFORE THE APPOINTMENT

ORGANIZE THE FACTS YOU ALREADY KNOW

1

DIAGNOSTIC HISTORY

Current and prior diagnoses, changed labels, hospitalizations, crisis care, and important dates.

2

TREATMENT

Therapy, medication, side effects, response, treatment gaps, and reasons for any gaps.

3

SYMPTOM PATTERN

Frequency, severity, duration, triggers, recovery time, and changes over time.

4

WORK OR SCHOOL

Attendance, reliability, concentration, conflict, accommodations, discipline, and job changes.

5

RELATIONSHIPS

Family, friends, isolation, communication, trust, conflict, and ability to participate socially.

6

DAILY FUNCTIONING

Sleep, hygiene, meals, finances, transportation, appointments, routines, and need for help.

USE NOTES TO REMEMBER, NOT TO REHEARSE

A short timeline can prevent forgotten dates. Describe your actual experience in your own words.

HOW TO DESCRIBE A PROBLEM

CONNECT THE SYMPTOM TO FUNCTION

F

FREQUENCY

How often does it happen?

Daily, weekly, intermittently, or during particular situations

S

SEVERITY

How intense is it?

What can and cannot be done while it is happening

D

DURATION

How long does it last?

Minutes, hours, days, or a continuing pattern

I

IMPACT

What does it change?

Specific effects on work, relationships, judgment, thinking, mood, or daily life

USE A CONCRETE EXAMPLE

Instead of only naming a symptom, explain a recent episode, what triggered it, how long it lasted, what help was needed, and what consequence followed.

THE FUNCTIONAL PICTURE

AREAS THE EXAM MAY EXPLORE

WORK

- Reliability and productivity
- Concentration and memory
- Stress and workplace interaction
- Attendance and task completion

SOCIAL

- Family and close relationships
- Friendships and isolation
- Conflict, trust, and communication
- Participation outside the home

DAILY LIFE

- Self-care and household tasks
- Appointments and medication
- Driving, shopping, and finances
- Sleep and daily routine

CLINICAL

- Treatment and medication response
- Hospitalization or crisis episodes
- Substance use and overlapping conditions
- Safety-related symptoms when present

DURING THE EXAM

ACCURATE REPORTING MATTERS

DO

- ✓ Answer honestly and as specifically as you can
- ✓ Describe both typical functioning and serious episodes
- ✓ Explain legitimate changes or inconsistencies
- ✓ Say when you do not remember or do not understand
- ✓ Discuss treatment effects and remaining impairment
- ✓ Correct a misunderstanding respectfully

DO NOT

- ✗ Minimize because the day happens to be better
- ✗ Exaggerate or repeat memorized rating language
- ✗ Assume the examiner already knows every fact
- ✗ Guess at dates, frequency, or medical conclusions
- ✗ Describe symptoms without explaining their impact
- ✗ Stop treatment solely because an exam is scheduled

AFTER THE APPOINTMENT

MAKE A RECORD WHILE DETAILS ARE FRESH

1

WRITE DOWN WHAT HAPPENED

Date, length, questions, testing, records discussed, and any important misunderstanding.

2

KEEP ATTENDING TREATMENT

The examination is not treatment and does not replace your regular care.

3

REVIEW THE REPORT WHEN AVAILABLE

Compare diagnoses, history, symptoms, findings, and conclusions with the evidence.

4

RESPOND TO A MATERIAL ERROR

Identify the exact factual or medical problem and submit relevant evidence through the proper claim lane.

A SHORT OR DIFFICULT EXAM IS NOT AUTOMATICALLY INADEQUATE

The useful question is whether the report is factually accurate, considers the relevant history, answers the requested question, and gives enough reasoning for VA to decide the claim.