

# CalMHSA

California Mental Health Services Authority

# Effective Administration of the Standardized Screening Tools

**June 6, 2025**

PRESENTED BY

Courtney Vallejo, LMFT & Lucero Robles, LCSW

In partnership with the Department of Health Care Services (DHCS)

Before we begin, please take a moment  
to respond to a brief poll



# Webinar Objectives

- Understand the importance of effective Screening Tool administration
- Develop trauma informed screening skills
- Enhance communication techniques for screening
- Recognize when and how to escalate concerns that arise during the screening process
- Ensuring cultural competence
- Remembering self-care

# Screening Tools: Purpose

- Guides whether mental health services should be provided by the Behavioral Health Plan (BHP) or Managed Care Plan (MCP).
- Required for all counties as of January 1, 2023.
- Note: Not used by Substance Use Disorder (SUD) providers.

# Screening Tools: More Than Compliance - A Path to the Right Care

- Screening Tools play a critical role in ensuring individuals receive the right care in the right place, at the right time.
- BHPs must ensure individuals are referred to the MCP when appropriate, reserving BHP resources for those eligible for a BHP assessment.

# Reliable Results Start with Proper Training

- Both clinical and non-clinical staff can administer the Screening Tools, provided they receive proper training.
- Comprehensive training ensures that all staff administer the tool in a consistent, accurate, and effective manner.
- Well-trained staff contribute to reliable and consistent screening results, ensuring individuals are connected to the most appropriate system of care.

# Know the Tools: Purpose, Format, and Expectations

- All staff who administer the Screening Tools must be familiar with the purpose, format, content, and expectations of each version (**Adult, Youth, and Respondent on Behalf of Youth**).
- Ensure staff are clear on which version of the tool to use, based on the individual being screened.
- Staff should know where to locate the Screening Tools and understand any BHP-specific expectations for completing them.



# Reflection Activity

Think about a time you called or went in person to a health care provider, therapist, or any organization for assistance – especially when you had a pressing or challenging need. Take a moment to reflect on your experience.

## **1. What aspects of the experience made it feel positive?**

1. Did the person listen to you attentively?
2. Did you feel respected and valued?
3. Were your concerns acknowledged and addressed in a way that felt supportive?

## **2. What aspects made it feel uncomfortable or not so good?**

1. Was there anything that made you feel rushed, unheard, or dismissed?
2. Did the interaction leave you feeling confused, frustrated, or uncertain about the next steps?

Now, think about how these experiences can guide the way you approach your own screenings. What can you do to create an experience that makes others feel comfortable and respected while gathering important information?

# Mindful Communication for Positive Engagement

## First Impressions Matter!

- **Introduce yourself:** Provide a warm greeting and share your name.
- **Set the Stage for Trust:** Explain the screening process and what they can expect. The tone you use in the screening process influences whether the individual feels comfortable being open and honest.
- **Use Warm, Professional, and Non-Judgmental Communication:** Ensure your words and body language convey respect and empathy throughout the interaction.
- **Listen Attentively:** Stay fully engaged, showing empathy and understanding, as this process may be emotionally difficult for the individual.
- **Be Mindful of Your Energy:** Your demeanor can influence how safe and welcoming the environment feels. Check in with yourself to ensure you're creating a calm and supportive atmosphere.

# Trauma-Informed Approaches to Screening Tool Administration

- **Trust and Transparency:** Explain the Screening Tool purpose and process clearly and ensure them that answers are totally confidential.
- **Safety:** Create a calm, private environment; reassure participants they can pause anytime.
- **Collaboration:** Frame it as working together; encourage asking questions.
- **Empowerment:** Offer choices and respect their pace.
- **Cultural Sensitivity:** Use inclusive, curious, respectful language.

# Trauma-Informed Approaches to Screening Tool Administration (continued)

- **Self-Awareness:** Be mindful of your tone and body language; avoid seeming rushed or demonstrating closed off body-language.
- **Observation:** Monitor signs of discomfort or distress.
- **Inform & Empower:** Explain the next steps in the process and what they can expect, provide any necessary resources and end with an appreciative statement about their willingness to share information with you and taking a positive step in their wellness journey.

# Sample Screener Script (Phone or In-Person)

“Thank you for taking the time to speak with me today. I’d like to ask you a few questions using a required Screening Tool. This helps us understand what kind of support might be most helpful for you (or the person you’re calling about). Some of the questions may feel personal, but your responses are completely confidential and will only be used to connect you with the right care. If anything is unclear or if you need to pause at any time, just let me know—we’ll go at a pace that feels comfortable for you. Does that sound okay?”

# Helping Individuals Feel Heard

- The sample script emphasizes creating a safe and supportive environment for individuals during the screening process.
- It's not just about asking questions and getting the Screening Tool completed – it is about ensuring that individuals feel comfortable, respected, and heard.
- Incorporating compassion into each interaction makes a difference in how individuals respond, helping them feel more open and engaged.
- By creating a space where they feel safe, you're not only gathering valuable information but also building trust and laying the foundation for a positive relationship throughout the care process.

# Responding Compassionately

- **Acknowledge Their Feelings:** "I understand this may be difficult; it's okay to feel that way."
- **Offer Support & Reassurance:** "You can take a break whenever you need; just let me know."
- **Normalize the Experience:** "Some people find these questions tough, and that's completely okay."
- **Maintain a Calm, Supportive Tone:** "Take your time—there's no rush. I'm here to help."

# Active Listening Techniques

- **Show Empathy Through Tone:** Use a warm, understanding tone to convey that you're fully engaged and attentive, even when asking yes/no questions.
- **Provide Non-Verbal Cues:** Nodding (in person) or offering short affirmations like "I see" or "I understand" (on the phone) helps reassure the individual.
- **Encourage Comfort with Pauses:** Give the individual space to process each question before answering. A brief pause can help ensure they're ready.
- **Use Positive Body Language:** Ensure open body language (in person) or tone (on the phone), such as leaning slightly forward or using a calm, steady voice, which shows attentiveness.
- **Reflect & Validate Responses:** After each answer, briefly acknowledge their response, e.g., "Thank you for sharing that with me." This helps build rapport and trust, even within the structured format.



# De-escalation Techniques

- **Stay Calm & Composed:** Use a calm, steady tone and open body language to create a sense of safety.
- **Acknowledge Emotions:** "I understand this may be difficult, and it's okay to feel that way."
- **Simplify Communication:** If needed, clarify a question for the individual to be able to respond.
- **Offer Control:** "Would you prefer to take a break or continue at your own pace?"
- **Be Patient:** Give the individual time to process and respond without rushing them.

# Recognizing When to Escalate for Support

- **Emergency or Crisis Situations:** If an individual reports an emergency or crisis, stop the screening immediately and follow crisis protocols.
- **Safety Concerns:** If the person becomes aggressive, highly emotional, or safety is at risk, escalate per your BHP's policies and procedures.
- **Suicidal Thoughts:** If the individual mentions suicidal thoughts in the past month, complete the screening and immediately refer them for clinical evaluation.
- **Trust Your Instincts:** If something feels off or uncertain—consult with a supervisor or clinical staff.

# Tailoring Your Approach: Adult vs. Youth

## Engaging Adults:

- Use clear, direct language while remaining warm and supportive.
- Emphasize autonomy and confidentiality to build trust.
- Be mindful of stigma—some adults may feel hesitant to disclose personal struggles.

## Engaging Youth:

- Use age-appropriate language and check for understanding.
- Build rapport first—help them feel comfortable before diving into the questions.
- If a caregiver is present, balance engagement with both the youth and their support system.
- Normalize emotions: “A lot of people feel this way, and that’s okay.”

## Language Considerations

- **Screening Tools Availability:** Available in 12 threshold languages to ensure accessibility.
- **Offer Screening in Preferred Language:** Always ask about language preference and use interpreters as needed to ensure accurate understanding.

## Language Considerations ( continued)

- If the Department of Health Care Services (DHCS) has not provided a translated version, wording may be adjusted for accurate translation.
- If a DHCS-translated version exists, changes are only allowed if local testing shows a need for adjustments to better serve the individual seeking care.

# Cultural Awareness in Screening

- Cultural awareness goes beyond translation—it ensures that mental health screenings are relevant, respectful, and effective for diverse populations.
- BHP staff should be trained in cultural humility, implicit bias, and the ways different cultures may express symptoms.
- Effective screening requires self-awareness—recognizing how your own cultural background and biases may shape interactions and interpretations.

# Cultural Competence: Setting the Tone

"Before we begin, I want to acknowledge that everyone's experiences and ways of expressing emotions can be different. There are no right or wrong answers—what matters is what feels true for you. If anything is unclear, or if there's a way I can ask something in a way that makes more sense to you, please let me know. You are welcome to answer in the language you feel most comfortable using, and if you'd like an interpreter, I can arrange that. Does that sound okay?"

## **This approach:**

- Acknowledges cultural differences in how symptoms are expressed.
- Invites the individual to clarify or adjust language as needed.
- Ensures accessibility and comfort with language.
- Reinforces a nonjudgmental and respectful tone.

# Self-Care Reminder

- **Acknowledge the Impact:**  
Difficult stories can take a toll.  
Take time to process.
- **Lean on Support** – Debrief with colleagues or supervisors when needed.
- **Check In with Yourself** – Pause and assess your own well-being.
- **Take Breaks** – Even short pauses help prevent burnout.
- **Use Grounding Techniques** – Deep breathing or movement can reduce stress.
- **Maintain Balance** – Prioritize rest and activities that recharge you.



# Additional Training Considerations

- Practice internally (roleplays, review of real-world scenarios).
- Ask for backup or support when needed.
- Solicit feedback periodically from individuals seeking care to support continuous quality improvement efforts.

# Questions?



Please feel free to reach out to  
[managedcare@calmhsa.org](mailto:managedcare@calmhsa.org)

Before you leave, please take a moment  
to respond to our post-webinar poll –  
thank you!



# Thank You

---