A comprehensive patient history and assessment should be taken prior to prescription of opioid agonist treatment, to ensure that such treatment is indicated and appropriate. The following checklist provides guidance for a thorough assessment.

**Date:** __________/__________

### Biopsychosocial History
- [ ] Prior drug treatment (pharmacological, detox, residential treatment, support groups, counselling, relapse prevention)
- [ ] Screen for process addiction such as sex, crime, spending, or gambling
- [ ] Legal history and current legal issues
- [ ] Financial concerns
- [ ] Employment history
- [ ] Family history
- [ ] Social/emotional supports
- [ ] Additional areas of concern for patient (e.g., sexual abuse, violence, child at risk, unsafe sex, other)

Note: A trauma-informed framework should be used when taking this history. The patient may not be comfortable talking about all of these topics until a positive working relationship and safety have been established. It is not required to have a complete biopsychosocial history in order to start OAT.

### Medical History
- [ ] Psychiatric history
- [ ] Surgical history
- [ ] Medications
- [ ] Allergies
- [ ] Review of systems

### Starting OAT
- [ ] Document that the patient meets DSM-5 criteria for OUD
- [ ] Assess and document stage of change
- [ ] Create and document a treatment plan including patient goals
- [ ] Check PharmaNet to avoid duplication of prescriptions and drug interactions with current medications
- [ ] Document rationale for therapeutic choices (methadone vs buprenorphine)
- [ ] Provide harm reduction education including prescription for take-home naloxone kit

### Substance Use
- [ ] Substance use history including type of drug, amount, route, age of first use, frequency of drug use, last use
- [ ] Withdrawal symptoms
- [ ] Overdose history
- [ ] Drug costs per day and source of money
- [ ] Document discussion regarding avoiding alcohol and respiratory depressants such as benzodiazepines

### Tests and Examinations
- [ ] HIV test
- [ ] Hepatitis C test
- [ ] Liver function test
- [ ] Urine drug test confirming opioid use
- [ ] Sexually transmitted infections screen
- [ ] Physical examination: intoxication, withdrawal, track marks
- [ ] Pregnancy test (if applicable)