INITIAL ASSESSMENT CHECKLIST

CLIENT HISTORY
☐ Discuss the rationale for assessment period:
  ➢ Establish rapport
  ➢ Ensure optimal readiness
  ➢ Ensure client has all information they need to start hormone therapy

☐ General medical intake & medical history

BASELINE DATA
☐ Vitals (incl. BP, Ht, Wt, Waist & Abdo circ.)
☐ Focused Physical Exam
☐ Blood work
☐ Health screening commensurate to age & risk profile

CLIENT EDUCATION, READINESS AND SUPPORTS
☐ Allow client to articulate their transition goals
☐ Ensure client expresses reasonable expectations
  ➢ Client understands timeline of changes
  ➢ Client understands limitations of hormone therapy

☐ Discuss effects on fertility and options available for preservation
  ➢ Fertility may be permanently affected by hormone therapy.

☐ Discuss pregnancy risk and options for contraception & implement these if needed

☐ Discuss psychosocial readiness
  ➢ Ensure supports are in place to facilitate healthy adjustment
  ➢ Refer to psychological support/counselling if necessary

☐ Review potential costs (e.g. medication, hair removal, fertility)

☐ Discuss risks, side effects, potential benefits and expected changes (reversible vs. irreversible) associated with treatment and ensure client demonstrates understanding

☐ Ensure client possesses capacity to consent
☐ Review medication options/treatment routes
☐ Submit EAP form (for clients on ODB)

RISK MANAGEMENT
☐ Ensure absence of absolute contraindications
☐ Optimally manage precautions
☐ Manage psychiatric co-morbidity, if present
☐ If smoker, advise smoking cessation counseling

DIFFERENTIAL DIAGNOSIS
☐ Rule out other possible diagnosis (i.e. psychiatric disorders that could mimic gender dysphoria such as psychotic or dissociative disorders)

☐ Ensure client meets Criteria for Gender Dysphoria

☐ No evidence of intersex condition (e.g. ambiguous genitalia, abnormal baseline hormone profile)

NEXT STEPS
☐ Choose initial hormone regimen
☐ Client signs Consent Form
☐ Discuss interest in Gender Affirming Surgery
☐ Offer support for changing client’s sex designation on Government ID