

Mental Status Exam Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A mental status exam (MSE) is the clinician's structured description of how a client presents at one point in time. It records observation, not history: the psychiatric counterpart of the physical exam, embedded in intakes, diagnostic evaluations, and progress notes, or standing alone. Convention, not law, sets the domains, so adapt headings to your setting.

Appearance what a stranger could see

Do: grooming, dress, apparent versus stated age, notable physical features.

Pitfall: evaluative shorthand like "disheveled" with nothing observable behind it.

Behavior & attitude engagement and motor activity

Do: eye contact, cooperation, rapport, psychomotor agitation or slowing.

Pitfall: "calm and cooperative" copied forward; identical entries across visits read as cloning.

Speech delivery, not content

Do: rate, volume, fluency, latency: pressured, slowed, monotone, halting.

Pitfall: describing what the client said; that belongs under thought content.

Mood, then affect two lines, two data sources

Do: quote the client for mood; observe range, intensity, and congruence for affect.

Pitfall: the two contradicting each other, or the narrative, with no comment on the mismatch.

Thought process organization and flow

Do: linear, circumstantial, tangential, or loose, with one example when abnormal.

Pitfall: a label with no example; "tangential" earns its place with the tangent.

Thought content & perception where risk status lives

Do: preoccupations, delusions, hallucinations asked or observed, and an explicit SI/HI status.

Pitfall: silence on SI/HI when risk came up in session, or "denies" what you never asked.

Cognition orientation, attention, memory

Do: record what you observed or briefly tested, in plain terms.

Pitfall: an MMSE or MoCA score pasted as the whole entry; a screen informs, it does not replace.

Insight & judgment anchored, not rated

Do: tie each to something the client said or did this visit.

Pitfall: bare "fair" or "poor" with no example and no link to a treatment decision.

Before you sign

- ☐ Mood quoted; affect observed; the two square up
- ☐ SI/HI status stated either way, matching the risk assessment
- ☐ Every label carries an observable
- ☐ No screening score standing in for the exam
- ☐ Exam matches this visit, not a pasted prior one
- ☐ Telehealth limits noted when domains were not observable
- ☐ Signed with credentials, dated promptly

Drafting with AI

Capture observation bullets during or right after session: appearance, behavior, speech, a mood quote, affect, thought process and content with SI/HI status, perception, cognition, insight, judgment.

"Draft the MSE section of an initial evaluation from these observations: on time, groomed, slowed but engaged, mood quote 'running on empty', denies SI/HI, oriented x4: ..."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

80–250 words

typical length

2–6 min by hand

clinical team estimate

Intakes · evals · follow-ups

when used

Care team · payers · courts

who reads it

Mental Status Exam Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Client (initials): _____ Date and time: _____ Setting: _____

Clinician / credentials: _____ Embedded in: intake / diagnostic evaluation / progress note / standalone _____

Appearance

Grooming, dress, apparent vs stated age, notable features

Behavior and attitude

Eye contact, cooperation, rapport, psychomotor activity

Speech

Rate, volume, fluency, latency

Mood (client's words)

Quote the client where possible

Affect

Range, intensity, stability, congruence with mood and content

Thought process

Linear, circumstantial, tangential, loose; example if abnormal

Thought content

Preoccupations, obsessions, delusions; SI/HI status either way

Perception

Hallucinations, illusions, dissociative experiences; asked or observed

Cognition

Orientation, attention, concentration, memory; note any brief test given

Insight

Awareness of condition, with an example from this visit

Judgment

Quality of recent decisions, with an example

Clinician signature / credentials: _____ Date signed: _____