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## Self-Assessment of Need for Assistance with Transition to Civilian Life: Development of the Road to Civilian Life (R2CL) Transition Checklist

26 January 2017

**James M. Thompson** MD FCFP, Research Medical Advisor<sup>1,2</sup> (VAC Co-Lead)

**Sanela Dursun** PhD, Research Director<sup>3</sup> (CAF Co-lead)

**Jennifer Lee** PhD, Research Scientist<sup>3</sup>

**Alla Skomorovsky** PhD, Research Scientist<sup>3</sup>

**Wendy Lockhart** BA BEd, Research Project Officer<sup>1</sup>

**Stewart Macintosh** MA, National Research Manager<sup>1</sup>

<sup>1</sup>Research Directorate, Veterans Affairs Canada, Charlottetown

<sup>2</sup>Adjunct Associate Professor, Department of Public Health Sciences, Queen's University

<sup>3</sup>Director General Military Personnel Research and Analysis, Canadian Armed Forces, Ottawa

VAC Email: [Jim.Thompson@vac-acc.gc.ca](mailto:Jim.Thompson@vac-acc.gc.ca)

CAF/DND Email: [Sanela.Dursun@forces.gc.ca](mailto:Sanela.Dursun@forces.gc.ca)

“... I am the master of my fate, I am the captain of my soul.”

“Invictus,” by William Ernest Henley.



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## Contents

|   |           |
|---|-----------|
| <b>Executive Summary .....</b>                                  | <b>4</b>  |
| Plain Language Summary .....                                    | 4         |
| Technical Summary .....   | 4         |
| <b>Sommaire .....</b>   | <b>6</b>  |
| Sommaire en langage clair .....                                 | 6         |
| Sommaire technique .....  | 6         |
| <b>Introduction .....</b>                                       | <b>8</b>  |
| <b>Methods .....</b>  | <b>9</b>  |
| Development Team, Funding, and Ethical Approval .....           | 9         |
| Development of the Initial Prototype .....                      | 9         |
| <i>Design Criteria</i> .....                                    | 9         |
| <i>Purpose of the Transition Checklist</i> .....                | 10        |
| <i>Graphic Design and User Interpretation</i> .....             | 10        |
| <i>Development of the Questions</i> .....                       | 11        |
| Development of the Final Versions .....                         | 12        |
| Interviews .....  | 12        |
| Cognitive Interview Testing .....                               | 13        |
| Emotion Response Testing .....                                  | 13        |
| <b>Results .....</b>  | <b>14</b> |
| Emotion-Response Test Results .....                             | 14        |
| Final Transition Checklists .....                               | 15        |
| <b>Discussion .....</b>   | <b>16</b> |
| <i>Advantages of the Transition Checklist Design</i> .....      | 16        |
| <i>Development of Followup Instructions</i> .....               | 17        |
| <i>Dissemination of the Transition Checklist</i> .....          | 17        |
| <i>Strengths, Limitations, and Further Research</i> .....       | 17        |
| <b>References .....</b>   | <b>18</b> |
| <b>Appendix 1. Checklist for serving members, English. ....</b> | <b>22</b> |
| <b>Appendix 2. Checklist for serving members, French.....</b>   | <b>23</b> |
| <b>Appendix 3. Checklist for Veterans, English.....</b>         | <b>24</b> |
| <b>Appendix 4. Checklist for Veterans, French. ....</b>         | <b>25</b> |

# Self-Assessment of Need for Assistance with Transition to Civilian Life: Development of the Road to Civilian Life (R2CL) Transition Checklist

## Executive Summary

### Plain Language Summary

Planning for life after military service can prevent a lot of problems down the road, so our team of researchers from Veterans Affairs Canada, the Canadian Armed Forces, and the Department of National Defence has created a short self-assessment tool called the *Road to Civilian Life (R2CL) Transition Checklist*. We designed it to help releasing and released CAF members think through whether they and their families are completely ready for civilian life.

The checklist contains 12 questions about your readiness for all the main aspects of civilian life. You or a family member or friend can use the checklist to help you decide whether you are good to go (green), whether you need to think about getting some help (yellow), or whether you should seriously consider getting some help (red) with one or more of work, finances, health, life skills, social relationships, or housing.

This report explains how we developed and tested the checklist with serving members and Veterans in both official languages. The report explains how you can use it to prepare for life after the CAF.

We are available to collaborate with agencies who want to use the tool.

### Technical Summary

**Background.** Military-civilian transition (MCT) is a stressful process for all CAF members and their families, with no fixed start- or end-date. Some releasing or newly released personnel (Veterans) are unaware that they have risk factors for well-being difficulties during MCT, so they do not seek transition support programs or they present late, when their problems have become difficult to manage. Others need reassurance that they are likely to do well without assistance. We found no examples of tools for self-assessment of the need for assistance with managing well-being in military-civilian transition, either in the literature or in conversations with colleagues in other nations. Accordingly, this report documents the self-assessment tool we developed to help serving CAF members and Veterans decide whether they should seek additional transition support.

**Development of the Transition Checklist.** This project was one of several applied research studies in the *Road to Civilian Life/Parcours vers la vie civile (R2CL/PVVC)* program of research. Our VAC–CAF team collaborated to develop an initial prototype of the tool by expert consensus through *a priori* development of design criteria, consideration of the published literature, findings from the 2010 and 2013 Life After Service Studies, and consultations with transition services in the CAF and VAC. The prototypes were refined and validated in two sets of cognitive interviews with serving members and Veterans in both English and French. The interviews demonstrated that the tool has good face validity and provided some evidence of content and construct validity.

**Description of the Transition Checklist.** The tool was designed to help serving and recently released CAF members to decide whether they are likely able to manage transition to civilian life without additional supports or whether they should seek assistance. The tool comprises 12 questions, two for each of six domains of well-being: employment or other main activity, finances, health, life skills and preparedness,

social integration, and housing. Users score themselves into one of three categories for each question: *should be good to go* (green), *need to think about it* (yellow) and *consider seeking assistance* (red). These colours were chosen to match the colour schemes used in the R2MR (Road to Mental Readiness) tool and in the administrative pre-deployment readiness categories, both of which are familiar to recent CAF members. Two versions of the Transition Checklist were created and validated, one for serving members and one for Veterans, each available in both official languages.

Putting the Transition Checklist to work. The checklist is intended for serving members, Veterans, family members, friends, and advisers who can influence members'/Veterans' decisions about seeking transition support. The tool is designed to fit on a single printed or online screen page. It can be distributed in print form, on a website, in PDF using email, or made into a mobile device app. Next steps include collaboration with service agencies to develop followup directions should the user rate themselves *need to think about it* (yellow) or *consider seeking assistance* (red). Contact points could be listed on the back the tool in the print format or could be made into links in electronic formats.

# Autoévaluation du besoin d'aide pour faire la transition vers la vie civile : élaboration de la Liste de vérification pour la transition – Parcours vers la vie civile (PVVC)

## Sommaire

### Sommaire en langage clair

Planifier sa vie après le service militaire peut nous éviter bien des problèmes à la longue. C'est pourquoi notre équipe de chercheurs d'Anciens Combattants Canada, des Forces armées canadiennes et du ministère de la Défense nationale a créé un bref questionnaire d'autoévaluation appelé *Liste de vérification pour la transition – Parcours vers la vie civile (PVVC)*. Il a été conçu pour aider les membres des FAC libérés et en voie de libération à déterminer si eux et leur famille sont réellement prêts pour la vie civile.

La liste de vérification contient douze questions sur votre état de préparation des militaires à tous les principaux aspects de la vie civile. Vous, un membre de votre famille ou un ami pouvez utiliser la liste de vérification pour déterminer si vous êtes prêt (vert), si vous devez songer à demander de l'aide (jaune) ou si vous devez songer sérieusement à obtenir de l'aide (rouge) avec au moins des aspects suivants : le travail, les finances, la santé, les aptitudes à la vie quotidienne, les relations sociales et le logement.

Des militaires actifs et des vétérans ont participé à la conception et à la mise à l'essai de la liste de vérification, qui est disponible dans les deux langues officielles. Le présent rapport explique comment nous avons conçu et mis à l'essai la liste de vérification et comment vous pouvez l'utiliser pour vous préparer à la vie après le service militaire.

Nous sommes prêts à collaborer avec les organismes qui souhaitent utiliser cet outil.

### Sommaire technique

Contexte. La transition de la vie militaire à la vie civile est un processus stressant pour tous les membres des FAC et leur famille. Il n'y a pas de date de début ou de fin précise. Certains militaires en voie de libération ou nouvellement libérés (vétérans) ne savent pas que leur bien-être risque d'être touché pendant leur transition, alors ils ne cherchent pas de programmes de soutien à la transition ou ils en cherchent trop tard, après que leurs problèmes sont devenus difficile à gérer. D'autres veulent qu'on leur dise qu'ils vont probablement faire la transition sans assistance. Nous n'avons trouvé aucun exemple d'outil d'autoévaluation du besoin d'aide pour gérer le bien-être durant la transition de la vie militaire à la vie civile, ni dans la littérature ni dans nos conversations avec des collègues d'autres pays. Par conséquent, le présent rapport décrit l'outil d'autoévaluation que nous avons conçu pour aider les membres actifs et les vétérans des FAC à décider s'ils doivent demander du soutien additionnel en matière de transition.

Élaboration de la Liste de vérification pour la transition. Ce projet est l'une de plusieurs études de recherche appliquée menées dans le cadre du programme de recherche *Parcours vers la vie civile (PVVC)*. Les membres de notre équipe d'ACC et des FAC ont collaboré à la conception d'un prototype initial de l'outil, selon la méthode de consensus d'experts, grâce à l'établissement *a priori* de critères de conception, à la prise en considération de la littérature sur le sujet et des résultats des Études sur la vie après le service militaire de 2010 et 2013, ainsi qu'aux consultations menés auprès des services de

transition des FAC et d'ACC. Le prototype a été peaufiné et validé dans le cadre de deux séries d'entretiens cognitifs menés auprès de militaires actifs et de vétérans, en français et en anglais. Les entretiens ont démontré que l'outil avait une bonne validité apparente et qu'il fournissait des preuves de la validité de contenu et de construit.

Description de la Liste de vérification pour la transition. L'outil a été conçu pour aider les membres actifs et les membres nouvellement libérés des FAC à décider s'ils sont probablement capables de gérer leur transition vers la vie civile sans assistance additionnelle ou s'ils devraient demander de l'aide. L'outil comporte douze questions, soit deux questions pour chacun des six domaines du bien-être : l'emploi ou les autres activités importantes, les finances, la santé, la préparation et les aptitudes à la vie quotidienne, l'intégration sociale et le logement. Pour chacune des questions, les utilisateurs obtiennent l'un des scores suivants : *Tout devrait bien aller* (vert), *Vous avez besoin d'y penser* (jaune) ou *Songez à demander de l'aide* (rouge). Ces couleurs ont été choisies parce qu'elles sont celles qui sont utilisées dans l'outil En route vers la préparation mentale (RVPM) et dans les catégories administratives de l'état de préparation préalable au déploiement. Les membres des FAC nouvellement libérés les connaissent bien. Deux versions de la liste de vérification ont été créées et validées, l'une pour les militaires actifs et l'autre pour les vétérans. Les deux versions étaient disponibles en français et en anglais.

Mise en œuvre de la Liste de vérification pour la transition. La liste de vérification est destinée aux militaires actifs et aux vétérans, ainsi qu'aux membres de leur famille, à leurs amis et à leurs conseillers pouvant influencer leur décision de demander de l'aide ou non pour la transition. Le questionnaire a été conçu pour être imprimé sur une seule page ou visualisé sur une page d'écran en ligne. Il peut être distribué en format papier, sur un site Web ou en format PDF. Il pourrait même être transformé en application mobile. Les prochaines étapes comprennent la collaboration avec des organismes de service afin d'établir les mesures que les utilisateurs doivent prendre s'ils ont le score *Vous avez besoin d'y penser* (jaune) ou *Songez à demander de l'aide* (rouge). Le nom de personnes-ressources pourrait être écrit au verso du questionnaire imprimé ou fourni dans des liens dans la version électronique de l'outil.

## Introduction

Release from military service and adjustment to life after service is stressful for members and their families. All members experience some kind of challenge in the process of military-to-civilian transition (MCT). Many and perhaps most are able to manage with the basic administrative, family, and community supports<sup>1-3</sup>, but others require additional help. Veterans Affairs Canada (VAC), the Canadian Armed Forces (CAF), and the Department of National Defence (DND) have developed many programs and services to assist CAF members and Veterans during MCT, complemented by a growing array of assistance programs in the non-governmental public and private sectors<sup>4</sup>. CAF members who are released for medical reasons have access to a variety of MCT resources.

Nonetheless, anecdotal evidence suggests that some releasing or newly released military members who could benefit from support programs either do not participate in them or present late, when problems are more difficult to manage<sup>5-8</sup>. Evidence indicates that some release from military service thinking that they will do well, only to experience well-being problems during MCT, and unanticipated or unmet MCT problems could set up them up for longer term difficulties in life after service<sup>8-10</sup>. In the 2013 *Life After Service Survey* of CAF Regular Force Veterans (released members), 60% of the one quarter who reported a difficult transition had not been released medically but had disproportionate prevalences of chronic health and socioeconomic problems<sup>11</sup>. Conversely, 48% of those who had been released medically reported not having a difficult transition<sup>12</sup> and thus might not have needed intense transition support. Further, a 2013 survey showed that 37% of Regular Force members and 88% of Reservists who had operational deployment service and were released during 1998–2012 did not participate in VAC transition interviews prior to release<sup>7</sup>. Moreover, anecdotal information suggests that some who did take transition interviews might not have fully disclosed their situations because they assumed that they would do well. The VAC Ombudsman found that CAF members' spouses are often unaware of supports and called for more direct and proactive communication to explain available programs and services<sup>8</sup>.

Researchers studying MCT outcomes worldwide have noted that inadequate planning and preparation for the challenges of adjusting to civilian life tends to be associated with post-service difficulty<sup>5,6,9,13,14</sup>. People undergoing major life transitions tend not to reflect fully on their preparedness for important aspects of the transition process. For example, CAF members who did not need civilian health care prior to recruitment and became used to ready access to care delivered by CAF Health Services might not anticipate that access to health care could be difficult after release. Members who are used to having their needs provided by the CAF might not be prepared to manage their civilian finances or seek civilian housing. The 2015 CAF *Your Say Survey* showed that about 80% of currently serving CAF members were unaware of the Director Casualty Support Management's (DCSM) publication *The Guide to Benefits, Programs, and Services for Serving and Former Canadian Armed Forces Members and Their Families*<sup>15</sup>. Less than half (48%) were aware of VAC Case Management or VAC Career Transition Services (46%), and only about 60% were aware of the CAF Career Transition Assistance Program.

Clearly, there is need for a simple way to prompt CAF members/Veterans to reflect on their MCT readiness and to help them determine whether they should seek MCT assistance. Self-assessment requires a period of introspection, an activity that prior research has shown can be enhanced. Self-assessment tools are widely used to prompt people to seek timely assistance for a variety of issues, including health problems, interpersonal violence, socioeconomic difficulties, and to encourage professionals to think critically<sup>16-20</sup>. However, we found no examples of self-assessment tools to promote self-assessment in military personnel or Veterans during MCT, either in the literature or in conversations with colleagues in other nations.

This paper describes the development of a self-assessment tool intended to encourage CAF members and Veterans to reflect on their risk for having difficulties in MCT and to encourage them to seek assistance

early on in their transitions. The objective was to develop an inviting, intuitive tool that could be easily disseminated among CAF members, Veterans, their families, and other supporters to promote self-assessment of well-being risk in MCT and so to optimize the well-being of CAF members and Veterans during MCT.

## Methods

The tool was designed in the following way. First, we designed prototypes for serving and Veteran members based on expert consensus and consideration of published research about factors that influence good MCT outcomes. Then we tested and refined the prototypes in two rounds of cognitive interviewing with serving members and Veterans. Cognitive interviewing is a key first step in designing questionnaires. The process seeks to understand how interviewees interpret and construct answers to the questions, identify difficulties they have in answering the questions, and understand other circumstances that might arise for them<sup>21,22</sup>. The interviews also assessed how serving members and Veterans responded to the design and utility of the tool.

## Development Team, Funding, and Ethical Approval

The VAC–CAF development team members are all researchers in military–civilian transition, representing psychology, social science, medicine, public health sciences, knowledge translation, and system management.

Funding for the transition checklist project was provided by VAC and the CAF and DND.

The research submission titled The Road to Civilian Life Self-Assessment Tool was approved by the DGMPRA Social Science Research Review Board in accordance with DAOD 5062-0 and 5062-1. The SSRRB approval # is 1523/16F.

## Development of the Initial Prototype

### Design Criteria

The team collaborated to develop an initial prototype of the tool by expert consensus, beginning with *a priori* development of design criteria (**Table 1**).

**Table 1. *A priori* design principles.**

---

#### *Design Principles*

- Appealing design to encourage use by busy people.
  - Encourage reflection so that users think about their situation in ways they might not have considered.
  - Outcome-focused: expected to predict and enhance transition ease/difficulty.
  - Accommodate all possible primary user subgroups (e.g., all ranks, all service branches and components, and all release types).
  - Participatory: built with significant input from transition service providers with military experience.
  - Informed by existing evidence on MCT life courses.
  - Not mandatory.
  - Preserves anonymity.
-

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#### *Desired properties of questions (items)*

- Based on domains of well-being in MCT.
  - Easy to understand and intuitive.
  - Contain terms and phrases that are military-specific and accurate.
  - Asks for a response to only a single issue.
  - Only one sentence long.
  - Where appropriate, includes impact on family.
- 

The intended primary users were both CAF members about to undergo MCT and recent Veterans in MCT. Secondary users were to be spouses or significant others, friends, colleagues, advocates, and staff in agencies such as the CAF and VAC who support and reach out to CAF members and Veterans and their families. The questions were developed for primary users.

### **Purpose of the Transition Checklist**

The team sought to develop a simple, easy-to-use tool that would encourage members and Veterans to seek assistance in MCT when they ordinarily would not have done so, or reassure them that they do not need to seek additional assistance. The team decided *a priori* that a member or Veteran should be able to infer, from reflecting on the questions and the offered responses, whether or not they are likely to experience well-being difficulty during MCT and, therefore, whether they should consider seeking additional assistance. The design challenge was to find a practical way to operationalize this construct through a self-assessment tool.

### **Graphic Design and User Interpretation**

The checklist prototype was designed to be easy to read and make the reader want to finish the whole checklist, like a game. The team settled on a green-yellow-red self-assessment continuum to represent self-assessed risk of experiencing difficulty in transition and to prompt seeking assistance. The colour scheme was thought to meet several of the design principles listed in **Table 1**: need for an intuitive self-categorization process and appealing design, to encourage reflection, and to focus on outcome.

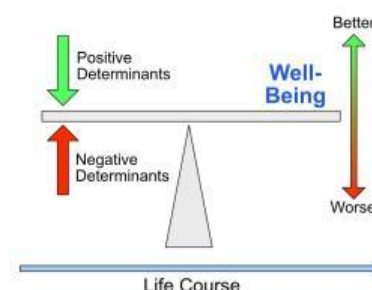
The colour continuum was inspired by the similar colour schemes in the CAF's *Road to Mental Readiness* (R2MR) mental health continuum model<sup>a</sup> and the CAF's deployment readiness categories. Both tools are familiar to recent CAF members, so they are used to thinking of green as having good mental health or being ready to deploy on operations and red as needing to seek mental health care or not being ready to deploy on operational duty. The continuum concept in both of those established programs encourages optimism in being able to move from yellow or red to green by taking appropriate actions. Green was selected to represent being unlikely to experience significant transition difficulty, yellow as uncertain, and red as likely.

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<sup>a</sup> [http://www.forces.gc.ca/assets/FORCES\\_Internet/docs/en/caf-community-health-services-r2mr/r2mr-pocket-card.pdf](http://www.forces.gc.ca/assets/FORCES_Internet/docs/en/caf-community-health-services-r2mr/r2mr-pocket-card.pdf) and [http://www.forces.gc.ca/assets/FORCES\\_Internet/docs/en/caf-community-health-services-r2mr/r2mr-aide-memoire.pdf](http://www.forces.gc.ca/assets/FORCES_Internet/docs/en/caf-community-health-services-r2mr/r2mr-aide-memoire.pdf) viewed 20 December 2016.

## Development of the Questions

The team decided to use two questions for each of the six domains of well-being in order to meet the design specifications of simplicity and compact presentation. The “well-being” construct used by the team was a composite type adopted at VAC that is much broader than just psychological well-being<sup>23</sup>. In this construct, well-being ranges from poor to good, measured subjectively and objectively in each of seven key areas of life (domains): employment or other main activity, finances, health (physical and mental), life skills and preparedness, social integration, housing/physical environment, and cultural/social environment (**Table 2**). The theory states that well-being fluctuates in these domains across the life course in response to determinants of well-being that arise from all the other domains. Just as there are lists of determinants of well-being in the health domain (the “determinants of health”), there are also lists of determinants of well-being in each of the other domains. For example, well-being in the employment domain is influenced by health and vice-versa. Good well-being means a person is able to manage independently in all the domains, but is more likely to need assistance if challenged in some. Studies of military personnel and Veterans have confirmed that they variably experience reintegration or MCT difficulties in all of these domains<sup>10,24-28</sup>.



**Table 2. Domains of well-being.**

| Domain                                     |
|--|
| 1. Employment or other meaningful activity |
| 2. Finances                                |
| 3. Health                                  |
| 4. Life skills and preparedness            |
| 5. Social integration                      |
| 6. Housing and physical environment        |
| 7. Cultural and social environment         |

The design of the tool addressed only the first six well-being domains because military personnel and Veterans undergoing MCT can only directly influence the first six well-being domains. The seventh, cultural and social environment, refers to the governance, social norms, values, race or ethnicity, gender roles, work environments, and the way Veterans are viewed by non-Veterans<sup>b</sup> -- all factors largely beyond their control.

Initial versions of the 12 questions were developed by expert consensus for each of the domains of well-being by either modifying questions in the existing literature or drafting new questions based on findings in the literature<sup>1,5,6,9,10,12,24-46</sup>. The team drafted questions using the rule that a *positive* response to all the questions should reassure the member or Veteran that they are likely to experience good well-being in MCT, while a *negative* response to any single question should lead the member or Veteran to realize that they might have difficulty in MCT and should seek formal assessment or support. A positive answer should lead the user to green (unlikely to experience significant transition difficulty) while a negative answer should lead the user to red (likely to experience transition difficulty) and so should consider seeking assistance.

<sup>b</sup> VAC Research Directorate. The seventh well-being domain: “Cultural and Social Environment.” Unpublished note. 18 November 2016.

The initial sets of questions were refined for the first prototypes by considering four lines of evidence in developing the initial draft questions:

1. Findings from the 2010 and 2013 *Life After Service Studies*. These large surveys produced findings highly representative of CAF Regular and Reserve Force Veterans who were released from service since 1998. The surveys identified subgroup demographic, military, health, disability, socioeconomic, and stress/coping characteristics associated with good and poor well-being, and with perceived ease and difficulty of adjustment to civilian life<sup>3,7,9,12,23,27,41</sup>.
2. Published scientific literature including literature reviews summarized in the *R2CL Backgrounder*<sup>9</sup>.
3. Findings from consultations with staff who support transition and outreach in various CAF, DND, and VAC programs.
4. Informal consultations with CAF members, Veterans, and informed staff members in VAC and the CAF who were not members of the research team.

At this point, we had two initial prototypes, one for serving members and one for Veterans, each with five main layout components:

1. A title section intended to catch the attention of busy people,
2. Instructions,
3. The 12 questions,
4. An intuitive process for self-categorizing the member or Veteran into likely or unlikely to have MCT difficulty, and
5. A placeholder for followup suggestions.

## Development of the Final Versions

Prototype refinement included refinement of the wording, usability, and appeal of the components. The 12 questions, self-assessment colour scheme, and graphic presentation were assessed in two series of cognitive interviews with CAF serving members and recently released Veterans.

## Interviews

The team designed a structured questionnaire ahead of the interviews with the following components:

1. Introduction and instructions to the interviewees, including consent to proceed.
2. Basic information about demographics and military service.
3. A series of probing questions for each question in turn, using a combination of the probing and think-aloud cognitive interviewing methods.
4. An emotional response test instrument for rating the checklist.
5. Finally, questions about when in a member's career the checklist would be useful for self-assessment, what type of members would find it useful, what directions should be added to the bottom of the tool if the member or Veterans feels help is needed, and whether they had any additional suggestions for the checklist.

The one-to-one, in-person, one-hour interviews were conducted in Ottawa during early 2016. Serving members intending to release from service were recruited at SCAN seminars. Veterans (released members) were recruited with the assistance of the Royal Canadian Legion's Service Bureau. Interviews were conducted with Regular Force and deployed Reserve Force members and Veterans (reservists who had prior Class C service but no Regular Force service) who had released from service within 10 years. Ten serving members and ten Veterans (7 Anglophones and 3 Francophones) were interviewed in each of

the two rounds. The majority were men and there were more non-commissioned members than officers. All three service elements were represented, but the majority were Canadian Army personnel.

### Cognitive Interview Testing

The cognitive interviews used concurrent probing: (a) the interviewer asking the checklist question, (b) the subject answering the question, (c) the interviewer asking a probe question, (d) the subject answering the probe question, and then if required further cycles of (c–d) until the issue was thought to be addressed. The structured interview used the following types of probes:

- Comprehension probe: How do you understand the words *to make ends meet*?
- Thinking process: Why did you respond that way?
- Interpretation probe: What does that mean to you?
- Ease of response: How hard was this to answer?
- Interpretation of the response categories: Is the response category applicable for this question?

In addition, it was anticipated that some particular terms may not be universally understood, so, if relevant, an additional probe was developed and applied to these questions. For example, the probe: “How do you understand the words *my preferred community*?” was used to ensure consistent understanding of the term *community*.

One team member conducted interviews of the English-speaking serving members, a second interviewed the English-speaking Veterans, and a third member conducted all the French-language interviews. Interviewers kept notes which they discussed with the team following each of the two interview rounds.

### Emotion Response Testing

In the emotion-response test<sup>48</sup>, which we adapted from the example online of the BBCi website redesign,<sup>c</sup> the interviewee was asked to rate the checklist on eight parameters (**Table 3**). They were shown the scale and asked to tell the interviewer their response, and invited to elaborate.

**Table 3. Emotion-response test scales.**

|                         |   |   |   |   |   |                     |
|-------------------------|---|---|---|---|---|---------------------|
| Confusing               | 1 | 2 | 3 | 4 | 5 | Clear               |
| Bright                  | 1 | 2 | 3 | 4 | 5 | Dull                |
| Professional            | 1 | 2 | 3 | 4 | 5 | Amateur             |
| Easy to answer          | 1 | 2 | 3 | 4 | 5 | Difficult to answer |
| Dull                    | 1 | 2 | 3 | 4 | 5 | Creative            |
| Boring                  | 1 | 2 | 3 | 4 | 5 | Exciting            |
| Not interesting         | 1 | 2 | 3 | 4 | 5 | Interesting         |
| Potentially great value | 1 | 2 | 3 | 4 | 5 | No value            |

The cognitive interviews were conducted in two stages. Findings from the first stage were used by the team in a consensus process to modify the initial prototype and plan the second-stage interviews. Findings from the second stage were used to decide by consensus on the content and graphic design of the final versions (Appendices 1 to 4). In consensus meetings, the team reviewed the cognitive interview findings for each of the questions, making decisions about refinements.

<sup>c</sup> "The Glass Wall" [www.currybet.net/download/theglasswall.pdf](http://www.currybet.net/download/theglasswall.pdf) viewed 18 December 2016.

# Results

## Emotion-Response Test Results

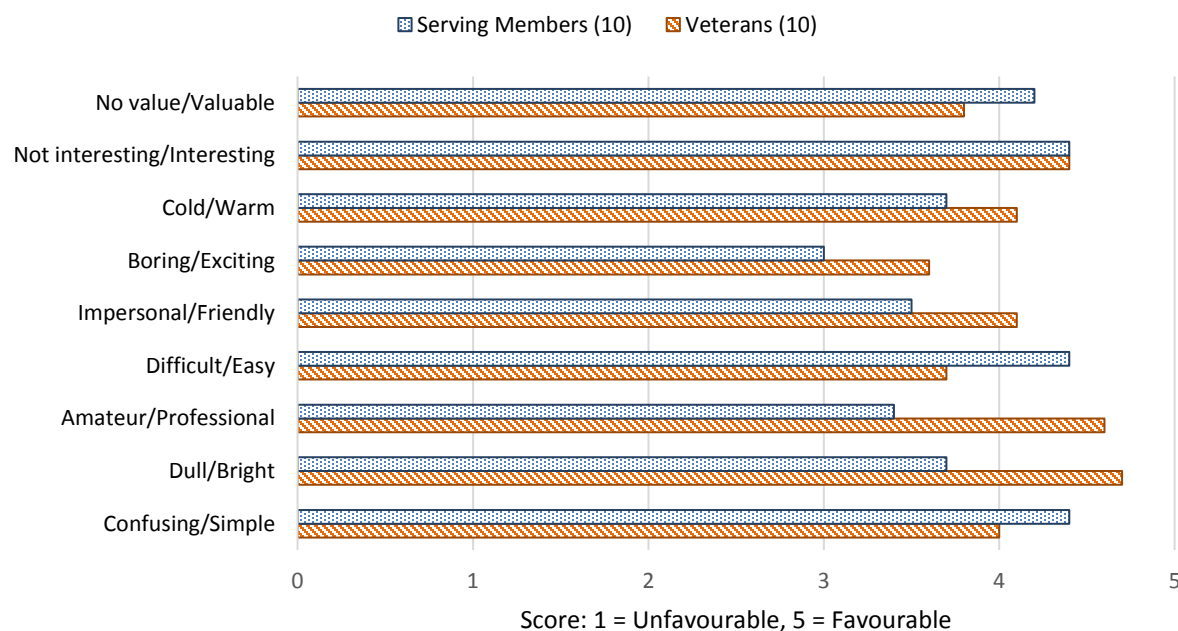
Figures 1 and 2 show the results of the emotion-response tests for rounds one and two. These results are not statistically representative, owing to the very small sample sizes, but they were helpful to the development team when combined with the interview notes. The round two results helped us to assess whether changes we made after round one were acceptable and to make further adjustments.

In general, the emotion-response test findings demonstrate acceptability of the design to both serving members and Veterans. The sample sizes are very small ( $n = 10$ ), so statistical testing is not appropriate. Instead, we used the findings qualitatively together with other observations to guide our thinking about the wording of the questions and graphic design of the tool after each of the two rounds of interviews. The average scores tended toward the positive ends of all the scales in both rounds of interviewing, indicating that (a) the initial design was favourable and (b) that only minor adjustments were necessary to fine tune the tool. When we made changes after round one, some scores went down. For example, some changes prompted serving members to score the tool lower on the “difficult/easy” scale in round two, which led us to reverse or revise related design features in the final version.

The relatively lower scores for the “boring/exciting” scale were not surprising: the interviewees (and, for that matter, interviewers) did not see self-assessment as a particularly exciting activity. However, even on that scale the responses tended toward “exciting” rather than “boring,” indicating that the tool was engaging. The higher scores on the “not interesting/interesting” scale, particularly for Veterans, reflected the interest that members and Veterans had in thinking about the MCT process.

Scores for serving members in round two were generally lower than in round one, owing to changes made after round one. This finding focused our attention on the interviewees’ comments, leading to changes that improved the final tool.

**Figure 1. Emotion-response test results from round one interviews.**



**Figure 2. Emotion-response test results from round two interviews.**



## Final Transition Checklists

The final versions of the *Road to Civilian Life/Parcours vers la vie civile* (R2CL/PVVC) self-assessment transition checklist are shown in Appendices 1 to 4. The checklists are available from the authors in Microsoft Word format.

The cognitive interviews and emotion-response test findings supported the need for different variations of the tool for members before and after release from service. Serving members found it difficult, for example, to answer the initial version of the first question about post-release employment, school or retirement when those three outcomes were combined into one question, whereas Veterans who were already living the released experience found it fairly easy to consider all three in one question.

- The title wording is specific for serving members or Veteran members.
- The banner image behind the title wording was constructed specifically for the R2CL research program to show CAF soldiers, sailors and air personnel undergoing MCT.
- The instruction “Select the response that applies to you for each of the statements below” is the result of several earlier options that did not test well.
- The 12 questions are grouped by domain of well-being using horizontal lines: employment or other meaningful activity (sense of purpose), finances, health, social integration, housing/physical environment and life skills/preparedness.
- While two outcome categories (yes or no) have certain theoretical advantages for self-assessment, the interviews indicated that the middle “not sure” (yellow) option allowed users to feel less intimidated by having to pick “no” (red), while still indicating caution to them and encouraging reflection about whether they should seek assistance.
- The first employment/main activity question tested well for Veterans as a single question but had to be broken into three separate parts for serving members.
- The last question, about family adjustment, starts with the preamble “if applicable” because not all members and Veterans go through MCT with families. An earlier version that emphasized the family also going through their own MCT did not test well: Members and Veterans felt that the

challenge for families was for them to adjust to the member's transition; hence the wording "adjust well to my transition." This finding suggests a potentially useful line of further research.

- The three self-assessment options (yes, to some extent, or no) provide a clear sense of choices between no significant risk of difficulty in MCT ("yes", green) to high likelihood of risk. The intermediate yellow "to some extent" category allows for cases where the user might have some issues but does not feel at much risk.
- The three recommendation options are soft—"consider seeking assistance" rather our initial "should seek assistance"—because some interviewees felt stigmatized by being unable to answer yes to some questions when earlier "should" wording was used, yet felt they were doing reasonably well with their current levels of support.
- The directions for where to seek help were left blank because they need to be developed for the production version of the checklist in collaboration with service agencies.

## Discussion

To our knowledge, this project has produced the first tool designed to assist serving military personnel and Veterans in evaluating their preparedness for military–civilian transition through self-assessment.

### Advantages of the Transition Checklist Design

The final design of the transition checklist has the following advantages:

- Designed from the ground up to facilitate self-assessment of likelihood that serving or recently released CAF members will experience difficulty in military-to-civilian transition.
- Uses a green/yellow/red colour scheme for categories to encourage taking action that is familiar to recent CAF personnel trained in the R2MR mental health and deployment readiness continua.
- Has good face validity and appears to be engaging and useful, based on interview testing with serving members in both English and French.
- The cognitive interviews suggest the checklist prompts CAF members and Veterans to consider seeking additional assistance with transition when they might not have done so, or reassure them that they do not need to.
- Can reassure appropriate CAF members and Veterans that they do not need to seek additional MCT support.
- The 12 questions are divided into the six domains of well-being with horizontal lines, which will facilitate linking specific needs with specific services.
- Compact and easy to distribute in print or electronic forms.
- Suitable for an interactive website or for mobile device applications.
- Can be used by spouses or partners, family members, friends, advocates, and support services to help members and Veterans decide whether they should seek additional transition supports.
- Can be used to reach CAF members and Veterans who do not receive pre-release transition interviews through the medical release pathway or do not participate in other means of active outreach to identify those who would benefit from MCT support, or who might not realize that they should engage with support services during transition.
- Can be used by support staff to guide discussions with releasing members and Veterans; for example, the checklist could be given to serving members prior to their VAC transition interview.
- Does not require the member or Veteran to divulge results to an authority.
- Can be used by any government, non-governmental organization, or private sector agency.
- The evidence base and development process has been fully documented by means of this report, enabling further systematic development.

## **Development of Followup Instructions**

Further development of the tool is required by service agencies to identify appropriate followup instructions. The tool will prompt members and Veterans to realize that their transition might not go so easily, and suggest relevant actions. Development of the followup instructions section will require consultations with service delivery personnel in both CAF and VAC. The instructions should be brief but clear, comprehensive, and easy to remember. There should be one set for serving personnel, and another set for released personnel.

The serving members and Veterans who were interviewed typically felt that simply referring them to a single website or 1-800 telephone number would be inadequate. They had a number of suggestions:

- For a print version, more detailed services specific to each well-being domain could be listed on the back (employment or other meaningful purpose in life, finances, health, social integration, housing and physical environment and life skills and planning).
- In electronic formats, take the user directly to services that could assist with the domain of well-being associated with the question.
- Serving members and Veterans will want to speak to a human being. In an online version, ensure that when the user clicks to ask for a call-back they receive immediate electronic acknowledgement, and that they can talk to someone within a day or two.
- Several felt that the followup instructions should point to the best non-government and government resources, not just CAF or VAC programs and services.

Actions could include attending a SCAN seminar, seeking a VAC Transition Interview, contacting an informed peer, seeking medical assistance, calling a referral line, or viewing online information about other transition support services specific to the well-being domains that the member or Veteran has flagged yellow or red.

## **Dissemination of the Transition Checklist**

The tool could be distributed to serving members, recent Veterans, and their families through various print and electronic media:

- Print distribution, including mail-outs, to members' and Veterans' bulletin boards, service agencies, health care facilities, Canex stores, bars, sports facilities—anywhere that military members and Veterans might frequent.
- Electronic forms: broadcast emails, posted in social media, posted on the CAF and VAC websites, released in a smartphone app, attached to the CAF release message.
- Given by non-governmental, VAC and CAF service agents, and CAF commanders to an individual they think might need transition support, including at the VAC pre-release transition interview.
- Distributed in CAF and VAC service centres, including MFRCs, JPSUs, IPSCs OTSSC clinics, OSI clinics, and VAC District Offices.

## **Strengths, Limitations, and Further Research**

The tool was designed by researchers at VAC and CAF experienced in studying MCT among serving members and Veterans and was informed by VAC and CAF staff who have a long experience working with transitioning members and Veterans. The expert consensus process was informed by published scientific literature on characteristics of serving members and Veterans who experience difficulty in MCT. The checklist assessed risk across multiple domains of composite well-being using a documented

well-being construct. Cognitive interview testing enhanced confidence in the face validity and potential utility of the tool.

Validating a questionnaire usually requires more than two questions per domain to permit construct validity analysis, but our objective was to develop a concise tool with a minimum number of questions. The checklist is not intended to be a psychometric instrument for use in screening or clinical assessment. Similarly, we did not develop the checklist as a way to score the risk of poor well-being in transition because the intent was to help members and Veterans reflect on their needs in specific domains of well-being. Patterns of needs will vary among individuals.

Although the tool is expected to be useful, construct validity and reliability have not been evaluated. Early versions of the 12 self-assessment questions were inserted into an upcoming survey of released CAF members, which will allow further validation. Interviews were limited to the Ottawa region and might not be representative of serving members and Veterans across the country. The transition checklist was not tested with Class A or B Reserve Force members in MCT. The tool could be formally evaluated to assess the reliability and construct validity of the checklists, to determine whether the checklist promotes self-assessment in CAF members and Veterans, and to evaluate the degree to which the checklist leads to help-seeking in CAF members and Veterans who would have delayed seeking help or not sought help at all.

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## Appendix 1. Checklist for serving members, English.



**Select the response that applies to you for each of the statements below:**

|  | Yes                      | To Some Extent           | No                       |
|--|--------------------------|--------------------------|--------------------------|
| ○ If applicable, I know what steps to take to:   |                          |                          |                          |
| • Secure a good job.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Enroll in an educational institution.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Prepare for retirement.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I have what I need to find a satisfying job or other meaningful activity.                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I am financially prepared for civilian life.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I will be able to make ends meet.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ My physical and mental health will allow me to function well in my daily life after release. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I know what steps to take to get access to the health care I will need after release.        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I will get the support that I need from my family and friends after release.                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I have hobbies and interests outside of the military.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I will have suitable housing arrangements after release.                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I will be able to live in my preferred location.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ I will adjust well to civilian life.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ If applicable, my family will adjust well to my transition to civilian life.                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**If you need help in any of these areas -- Employment, Finances, Health care or Rehabilitation, Social Supports, Housing or Other areas of life – See \_\_ for services that can help**

**Should be good to go**

**Think about it!**

**Consider seeking assistance**

## Appendix 2. Checklist for serving members, French.



**Pour chacun des énoncés ci-dessous, choisissez la réponse qui s'applique à vous.**

**Oui**      **Dans une certaine mesure**      **Non**

|  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| ○ S'il y a lieu, je sais quelles sont les mesures à prendre pour :   |                          |                          |                          |
| • Obtenir un bon emploi.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • M'inscrire dans un établissement scolaire.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Me préparer à la retraite.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ J'ai ce qu'il me faut pour trouver un emploi satisfaisant ou une autre activité valorisante.               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Sur le plan financier, je suis prêt à la vie civile.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Je parviendrai à joindre les deux bouts.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Ma santé physique et ma santé mentale me permettront de bien fonctionner au quotidien après ma libération. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Je connais les mesures à prendre pour obtenir les soins de santé dont j'aurai besoin après ma libération.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ J'obtiendrai le soutien dont j'ai besoin de ma famille et de mes amis après ma libération.                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ J'ai des loisirs et des intérêts à l'extérieur du milieu militaire.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Mes conditions de logement seront adéquates après ma libération.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Je serai en mesure de vivre dans la région que je préfère.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Je m'adapterai bien à la vie civile.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ S'il y a lieu, ma famille s'adaptera bien à ma transition à la vie civile.                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Si vous avez besoin d'aide en ce qui concerne quoi que ce soit des éléments mentionnés ci-dessus - emploi, finances, soins de santé, soutien social, logement ou autre aspect de la vie - consultez \_\_\_\_ pour des services qui peuvent aider**

**Tout devrait bien aller**      **Pensez-y!**      **Il faudra peut-être demander de l'aide**

### Appendix 3. Checklist for Veterans, English.



**Select the response that applies to you for each of the statements below:**

|  | Yes                      | To Some Extent           | No                       |
|--|--------------------------|--------------------------|--------------------------|
| <input type="radio"/> I have secured a good job or enrolled in an educational institution or I am prepared for retirement. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I am satisfied with my prospects for a job or other meaningful activity.                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I am financially prepared for civilian life.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I am able to make ends meet.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> My physical and mental health allow me to function well in my daily life.                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I have access to the health care I need.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> My family and friends provide me with all the support I need.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I have hobbies and interests outside of the military.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I have suitable housing arrangements.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I am living in my preferred location.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> I have adjusted well to civilian life.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> If applicable, my family has adjusted well to my transition to civilian life.                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**If you need help in any of these areas -- Employment, Finances, Health care or Rehabilitation, Social Supports, Housing or Other areas of life – See \_\_ for services that can help**

**Should be good to go**

**Think about it!**

**Consider seeking assistance**

## Appendix 4. Checklist for Veterans, French.



**Pour chacun des énoncés ci-dessous, choisissez la réponse qui s'applique à vous.**

Oui

Dans une certaine mesure

Non

|   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| <input type="radio"/> J'ai obtenu un bon emploi ou je me suis inscrit dans un établissement scolaire ou je me suis préparé à la retraite. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> Je suis satisfait de mes possibilités d'emploi ou d'autre activité valorisante.                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> Sur le plan financier, je suis prêt à la vie civile.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> J'arrive à joindre les deux bouts.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> Ma santé physique et ma santé mentale me permettent de bien fonctionner au quotidien.                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> J'ai accès à tous les soins de santé dont j'ai besoin.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> Ma famille et mes amis m'offrent tout le soutien dont j'ai besoin.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> J'ai des loisirs et des intérêts à l'extérieur du milieu militaire.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> Mes conditions de logement sont adéquates.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> Je vis dans la région que je préfère.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> Je me suis bien adapté à la vie civile.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="radio"/> S'il y a lieu, ma famille s'est bien adaptée à ma transition à la vie civile.                                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Si vous avez besoin d'aide en ce qui concerne quoi que ce soit des éléments mentionnés ci-dessus - emploi, finances, soins de santé, soutien social, logement ou autre aspect de la vie - consultez \_\_\_\_\_ pour des services qui peuvent aider**

Tout devrait bien aller

Pensez-y!

Il faudra peut-être demander de l'aide