CBT Supervision Preparation Checklist

A practical three-page blueprint for beginner CBT therapists | SelfImproveCoach

Purpose: Arrive with a focused question, a concise formulation and the information your supervisor needs. Supervision supports clinical thinking, safe practice and professional development.

01 Prepare safely and purposefully

☐ Identify whether any immediate risk or safeguarding concern needs action now; follow local procedures rather than waiting for routine supervision.

☐ Check the supervision agreement, confidentiality requirements and approved systems for sharing information. Remove identifying client details from teaching materials.

☐ Choose one or two cases or practice issues and identify what decision or learning you need from supervision.

02 Gather a concise case snapshot

Bring	Helpful details
Context	Presenting difficulty, client goals, relevant history and current circumstances (de-identified).
Assessment	Key symptoms, functioning, measures and current risk assessment or changes.
CBT formulation	Triggers, thoughts, emotions, body sensations, behaviours and maintaining cycles.
Treatment so far	Session stage, interventions, between-session practice, engagement and response.
Your uncertainty	What is unclear, what you have tried, and what you want help deciding.

03 State a clear supervision question

Less useful: “I am stuck with this client.”
More useful: “The client understands the social anxiety formulation but continues to use subtle safety behaviours. How can I design a collaborative experiment to test the feared prediction?”

Quick pre-supervision check

☐ I have a clear question. ☐ I can summarise the formulation. ☐ I have relevant outcome and risk information. ☐ I know what decision is needed.

A 6-Step Supervision Blueprint

Use this pathway to make discussion structured, collaborative and clinically useful.

1 Prioritise | Name urgent issues and agree the agenda.

2 Present | Give a brief case snapshot and working formulation.

3 Ask | State the specific clinical question or dilemma.

4 Explore | Consider evidence, alternative explanations, barriers and your responses.

5 Decide | Agree next clinical steps, responsibilities and any escalation.

6 Reflect | Record learning, review outcomes and identify follow-up.

04 Useful supervisor discussion prompts

Focus	Questions to bring
Formulation	Which maintaining process best explains what I am seeing? What evidence challenges my hypothesis?
Intervention	Why this technique now? How does it connect to the client's goal and formulation?
Alliance	Where might we be misaligned? Have I checked the client's understanding and preferences?
Therapist process	What assumptions, emotions or avoidance might be influencing my decisions?
Risk and ethics	What needs prompt action, consultation or documentation under local policy?

05 Supervision is not a substitute for urgent action

If there is immediate danger, significant safeguarding concern or a time-critical clinical decision, use your service's urgent escalation pathways. Routine supervision should not delay appropriate action.

From Supervision to Clinical Action

A worked example, reusable planning template and final checklist.

06 Worked example | Social anxiety

Element	Example
Clinical snapshot	Client avoids speaking in meetings; predicts colleagues will think they are incompetent.
Maintaining pattern	Rehearsing sentences and avoiding eye contact reduce immediate uncertainty but limit learning.
Supervision question	How can I test the prediction while respecting the client's pace and preferences?
Possible agreed action	Collaboratively plan a manageable behavioural experiment, identify safety behaviours and agree what learning to review.
Follow-up	Review prediction, observations, client feedback and any change in formulation.

07 My supervision preparation template

Case / topic (de-identified):

_____

My main supervision question:

_____

Current formulation / evidence:

_____

Risk, safeguarding or ethical issues and actions already taken:

_____

What I have tried / client response:

_____

Agreed action, owner and review date:

_____

08 After-supervision checklist

☐ Document the discussion and rationale in the appropriate secure record.

☐ Complete urgent actions and follow local escalation or consultation requirements.

☐ Agree changes collaboratively with the client; do not present supervision ideas as facts.

☐ Review the effect of the plan and bring unresolved questions back.

Key reminder: Good supervision preparation is not about having every answer. It is about bringing a thoughtful formulation, recognising uncertainty and leaving with a clear, safe next step.