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CBT ASSESSMENT | PRESENTING NEEDS

Collaborative assessment notes and initial understanding

1 Presenting problem

What brings the person now? When did it begin? What keeps it going?

Main difficulties and what the client wants help with

Example: Anxiety when speaking in meetings; wants to participate more confidently.

Onset, triggers, frequency, intensity and duration

When did it start? What makes it better or worse?

2 Impact and current functioning

Explore daily life and what is already helping.

Impact on work/study, relationships, self-care and routines

Strengths, support and existing coping strategies

What has helped so far? What matters to the client?

Therapist prompt

Use open questions, reflect back, and check you have understood.

CBT ASSESSMENT | CONTEXT & CYCLE

Background, the Five Areas and a provisional shared formulation

3 Relevant background

Explore only what is relevant and appropriate for this assessment.

Relevant history, life events, relationships and context

Include education/work, health, medication and support as relevant.

Previous help or treatment, helpful and unhelpful experiences

4 Current situation: Five Areas

Use a recent specific example; look for links, not a perfect formulation.

Situation / trigger

What happened, where and with whom?

Thoughts, meanings and feelings

What went through their mind? What did they feel in body and emotion?

Behaviours / responses

What did they do, avoid or seek reassurance about?

Working hypothesis: What seems to maintain the difficulty?

CBT ASSESSMENT | SAFETY & GOALS

Risk, safeguarding and agreed priorities

5 Risk and safeguarding

Ask directly, sensitively and according to your service procedures.

Risk assessment summary and protective factors

Consider self-harm/suicide, risk to others, vulnerability and current supports.

Safeguarding, immediate actions, escalation and follow-up

Document actions in approved clinical systems; do not rely on this worksheet.

Important

Urgent risk requires your service pathway, not waiting for this form.

6 Goals, strengths and resources

Agree what meaningful change would look like for the client.

Client-defined goals and what would be different

Example: Contribute one comment in a weekly meeting.

Strengths, values, resources and support people

Outcome measures used / baseline and context (if appropriate)

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CBT ASSESSMENT | NEXT STEPS

Summarise collaboratively and plan appropriate follow-up

7 Shared understanding

What have we understood together? What remains uncertain?

Summary of main difficulties and maintaining patterns

Questions or areas needing further assessment

8 Agreed next steps

Choose an appropriate plan with the client.

Initial goals, options discussed and agreed next actions

Example: Start activity monitoring; review formulation together next session.

Follow-up / referrals / supervision and review point

FINAL CHECK

[ ] Presenting difficulty, functioning and context explored
[ ] Risk/safeguarding considered using local procedures
[ ] Goals, understanding and next steps checked with client