# CBT assessment prompt sheet

For use by a therapist during an appointment. Adapt to the person, their age, the setting and your professional responsibilities.

## 1. Start with the person

Agree what matters today and explain confidentiality and its limits. Check communication, cultural and practical needs. For remote work, agree privacy, current location, a safe contact route and what to do if the connection is lost.

## 2. Explore the difficulty

Clarify the main problem, its onset and course, context and impact. Consider real pressures, discrimination, relationships and physical health alongside symptoms. Explore changes in mood, attention, sleep, appetite and daily functioning.

## 3. Work through one recent example

Separate what happened from the meaning given to it. Explore thoughts or images, feelings, body sensations, attention and actions, including avoidance. Ask about immediate relief and later costs. Check your understanding with the person.

## 4. Review health and previous support

Ask about relevant health conditions, medicines, recent changes and substance use. Medication decisions belong with the prescriber. Explore earlier treatment, what helped, what did not, and any barriers to receiving care.

## 5. Explore safety and safeguarding

Ask directly about suicide, self-harm and harm to others. Where relevant, clarify current thoughts, intent, plans, access to means, recent and past behaviour, distress and ability to stay safe. Explore abuse, neglect and safeguarding needs, including dependants. Identify support and agree proportionate actions; follow the relevant urgent-care and safeguarding pathways. Record the reasoning and actions. A blank worksheet answer does not establish safety; do not use this form to assign a risk score.

## 6. Develop a shared understanding

Summarise the difficulty and possible maintaining links, including strengths and circumstances. Treat this as a working explanation to refine together. Use the relevant disorder-specific CBT model and appropriate assessment measures rather than assuming one cycle fits everyone.

## 7. Agree meaningful goals and options

Choose a useful, observable first goal. Discuss suitability, treatment options, preferences and any support or referral needed. Check what the person understood, invite corrections and make space for questions.

## 8. Finish with a clear next step

Agree any manageable between-session task, how and when it will be reviewed, and the next contact. Confirm support arrangements if needed. This prompt sheet supports a conversation; it is not a diagnostic instrument or a full clinical or risk assessment.

### Guidance informing this original resource

NHS. Cognitive behavioural therapy (CBT).
NICE (2021). Shared decision making. NG197.
NICE (2022). Self-harm: assessment, management and preventing recurrence. NG225.

The sources inform the approach; they do not endorse this resource.


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