CBT assessment worksheet

Use before or during an assessment. Brief notes are enough. You can leave a question for discussion or continue on another sheet.

Name or initials (optional)

Date

What would you like help with?

Why are you seeking support now?

One recent difficult moment

Situation
What happened? Where were you, and who was there?

Thoughts or images: what went through your mind?

Feelings
Name the feelings; add their strength if useful.

Body sensations
What did you notice in your body?

What did you do, avoid or check?

What happened straight afterwards or later?

Keep your completed copy private. Typing in this PDF does not send it to the website or a therapist.

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Patterns, impact and what helps

Look at the wider pattern. You do not have to remember every detail; start with what you have noticed.

When did the difficulty begin?
Has it changed over time? Include anything that seemed to set it off.

When is it more or less likely?
Think about situations, people, places or pressures.

How often does it happen, and how long does it last?
How upsetting or difficult is it for you?

What do you do to cope?
Include things that help now and anything that may make life harder later.

How does it affect everyday life?
For example, work or study, relationships, sleep, routines or activities.

What supports you?
People, interests, routines, beliefs, skills or things you have managed before.

What would you like to be able to do?
Describe a change that would matter to you in daily life.

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Health, safety and next steps

Share what feels relevant. Sensitive questions can be discussed with your therapist rather than written here.

Health and wellbeing

Any health conditions, or changes in sleep, appetite, energy, concentration or mood?

Medicines and treatment

Note relevant medicines, changes, side effects or questions. Discuss any medication changes with your prescriber.

Alcohol, nicotine, caffeine or other substances

If relevant, note what you use, how often, and any concerns.

What support or treatment have you tried?

What helped, what did not, and what would you prefer this time?

Safety and support needed today

Any thoughts of suicide, self-harm or harming someone else; feeling unsafe, abuse, or difficulty looking after yourself? Talk this through with your therapist.

What would help you take part in therapy?

Consider pace, communication, format, cultural needs or practical barriers.

What have we agreed today?

Main priority, any practice or support, questions to return to, and next appointment.

This PDF is not monitored. If you need urgent help, contact urgent or emergency services rather than wait for an appointment.

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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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