THE FIRST SESSION CHECKLIST

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INTRODUCTION

The First Session Checklist is an easy guide for conducting a first session with an individual, couple, or family. It includes basic components of a a first session that can often be overlooked, essential assessment information, as well as sample questions for accomplishing checklist tasks. The checklist is easily adaptable to your preferred way of conducting a first session as well as your stage of development as a therapist.

HOW TO USE THE FIRST SESSION CHECKLIST

The First Session Checklist is organized like an initial face-to-face session, and it includes timeframes for each task. The session on which the checklist is based is 55 minutes long. Please keep in mind that:

- many items must be addressed to each client. If the client is a family, then more time may be needed. In this case, first session tasks may be completed during an initial assessment time of 1-3 sessions, or the first session can be lengthened to an assessment length (e.g., 1.5 sessions)
- Adapt language for age-appropriateness in order to get the input of every family member, when applicable
- The checklist is applicable and adaptable to any therapeutic setting, including private practice, agency, hospital, in-home, and others

LET'S CHAT

Send me feedback on The First Session Checklist, and tell me how you’re using it: E-mail me at ili@familytherapybasics.com, or use the hashtag #familytherapybasics on social media.

If this resource has been helpful to you, send it to a therapist you know, and make their life easier!

DISCLAIMER

The First Session Checklist is meant to be a basic first session map that allows for joining, problem identification, and goal setting. It is based on a systemic perspective and a relational therapeutic orientation when a client is presenting with couple and family concerns. If your work is focused on mental health diagnosing and treatment, then other factors must be considered and included during the first session. Assessing suicidal ideation and other factors related to mandated reporting take precedence if and when they are discovered during the initial session.
THE BASICS (10-15 MINUTES)

☐ Welcome new clients, and
  • introduce yourself
  • confirm their names and what they prefer to be called
  • invite them to sit anywhere (for initial observation of relationship dynamics)

☐ Ask if they had any difficulty finding your location, if so
  • solve any problems for them (for example, provide a hand-out with directions)

☐ Explain the purpose of initial paperwork, and provide first session documents (HIPAA explanation and signature page, informed consent, basic client information, etc.), along with your business card

☐ Review paperwork for completeness and accuracy, ensuring client signatures and correct date

☐ If you haven’t already, ask how the client(s) were referred to you

☐ Verbally review confidentiality and its limits (that is, mandated reporting), cancellation policy, policy for electronic communication, designated fee, and payment expectations

☐ Assess whether releases of information are needed for family members, third party payers, and/or other health care providers, and complete if necessary

☐ Assess whether client(s) have previously attended therapy; if so,
  • inquire as to their experience in therapy, and how you could provide a different experience, if applicable

☐ Ask if the client(s) have any questions (some therapists allow clients to ask personal questions at this point)
ORIENTATION TO THERAPY (10 MINUTES)

☐ Explain your credentials, experience, and general qualifications for working with the client(s)

☐ Explain what therapy is and isn’t [some examples: a) “I do not give advice, but I help you consider your choices and get clear about what’s most important to you, so that you can make a decision;” or, b) “During therapy session, we process emotions, figure out what’s working and what isn’t, etc., so that you can take steps toward your goals between sessions. The majority of therapy work is done outside of session.”]

☐ Explain your theoretical orientation as well as why it’s the best choice for the client(s) (if applicable)

☐ Explain the structure of the first session (for example: “During the first session, I typically ask a lot of questions, so that I can understand the goals you each have for your marriage.”)

☐ Explain what the client(s) will gain from the session (for example: “At the end of this session, you will know what your goals are for therapy, how I can help you accomplish those goal, as well as an approximate timeframe for therapy.”)

☐ Ask if the client(s) have any questions

ASSESSMENT (15-20 MINUTES)

☐ Assess the reason(s) the client(s) have sought therapy (that is, the presenting problem)

☐ Assess how the client(s) decided to participate in therapy (for example: “How did you make the decision to come to therapy?”)

☐ Assess the client(s)’ a) desire and b) motivation for change [for example, these scaling questions: a) “On a scale of 1 to 10, 1 being very low, and 10 being very high, how much of a problem is this for you?” and, b) “On a scale of 1 to 10, how much effort are you able to put into changing this problem right now?”

☐ Assess how the client(s) have already addressed the problem

☐ Assess the clients' goals (that is, help the client “paint a picture” for you of how they would like things to be different). Make sure the goals are in positive (actionable) rather than negative terms (for example, “I’d like to understand my partner” is preferable to “I don’t want to argue with my partner.”)
ASSESSMENT (CONT.)

☐ Clarify and negotiate goals for therapeutic relevance (for example, “I want to be happy” is not a measurable therapeutic goal; however, “I want to find satisfying work” is a specific, measurable goal”).

CLOSING (10 MINUTES)

☐ Summarize the client(s)’ goals as they have been agreed upon by you and the client(s)
☐ Present the preliminary treatment plan referred to in Orientation to Therapy (second to last point)
☐ Assess the client(s)’ feedback on the session (for example: “What is one thing that was helpful about, or that you are taking away, from this session?”)
☐ Discuss scheduling (that is, do the clients want to schedule another appointment now, or do they want to think about it and get back to you?)
  • if the client(s) do not schedule, let them know you will follow-up with them within one week, or a specific timeframe
☐ Take payment and provide a receipt (this can also be done at the beginning of the session)

AFTER SESSION TASKS

☐ Complete a session summary note according to you state’s rules and laws
☐ Save all paperwork in a new client file; assign the file a confidential client number
☐ Document the confidential client number, referral source, contact information, and other pertinent information, so that it can be accessed between sessions for service continuity
☐ Store paperwork and contact information according to your state’s rules and laws