

**S** Subjective

**1 PATIENT IDENTIFICATION**

Name: \_\_\_\_\_ DOB / Age: \_\_\_\_\_  
Sex: \_\_\_\_\_ MRN: \_\_\_\_\_  
Date of Session: \_\_\_\_\_ Session Type: \_\_\_\_\_  
Clinician: \_\_\_\_\_ Duration of Session: \_\_\_\_\_  
Accompanied by: \_\_\_\_\_

**2 CHIEF COMPLAINT**

Primary concern (patient's words): \_\_\_\_\_

**3 SYMPTOM UPDATE**

**EMOTIONAL**

Mood (low, anxious, irritable, stable), emotional reactivity / regulation difficulties...

**COGNITIVE**

Attention, memory, executive functioning concerns, negative thought patterns / rumination...

**BEHAVIOURAL**

Avoidance, impulsivity, compulsions, social engagement / withdrawal...

**4 FUNCTIONAL STATUS**

Work / academic functioning: \_\_\_\_\_  
Interpersonal relationships: \_\_\_\_\_  
Activities of daily living: \_\_\_\_\_  
Self-care: \_\_\_\_\_

**5 STRESSORS, TRIGGERS & CONTEXT**

Recent life events: \_\_\_\_\_  
Identified triggers: \_\_\_\_\_  
Environmental / interpersonal stressors: \_\_\_\_\_

**6 COPING STRATEGIES**

Current coping mechanisms: \_\_\_\_\_  
Effectiveness / limitations: \_\_\_\_\_

**7 RISK ASSESSMENT (SUBJECTIVE)**

Suicidal ideation (SI): \_\_\_\_\_ Self-harm thoughts / behaviours: \_\_\_\_\_  
Homicidal ideation (HI): \_\_\_\_\_ Protective factors: \_\_\_\_\_

**8 TREATMENT PROGRESS (PATIENT-REPORTED)**

Perceived change: \_\_\_\_\_  
Barriers to progress: \_\_\_\_\_

## O Objective

### 9 GENERAL OBSERVATIONS

Appearance / grooming / hygiene: \_\_\_\_\_ Psychomotor activity: \_\_\_\_\_  
Eye contact: \_\_\_\_\_ Engagement / cooperation: \_\_\_\_\_

### 10 MENTAL STATUS EXAMINATION (MSE)

#### SPEECH

Rate / volume / coherence: \_\_\_\_\_

#### MOOD & AFFECT

Reported mood: \_\_\_\_\_ Range / stability: \_\_\_\_\_

Observed affect: \_\_\_\_\_ Appropriateness: \_\_\_\_\_

#### THOUGHT PROCESS

Thought process: \_\_\_\_\_

#### THOUGHT CONTENT

Preoccupations, obsessions, delusions, SI/HI (objective assessment)...

#### PERCEPTION

Hallucinations / perceptual disturbances: \_\_\_\_\_

#### COGNITION (BRIEF)

DOMAIN	FINDINGS
Orientation (time / place / person)	_____
Attention & concentration	_____
Memory (recent / remote)	_____

#### INSIGHT & JUDGMENT

Awareness of condition: \_\_\_\_\_

Decision-making capacity: \_\_\_\_\_

### 11 NEUROPSYCHOLOGICAL / COGNITIVE OBSERVATIONS

Attention & processing speed: \_\_\_\_\_

Executive functioning: \_\_\_\_\_

Memory functioning: \_\_\_\_\_

Language & comprehension: \_\_\_\_\_

### 12 SOMATIC / PHYSIOLOGICAL STATE

Arousal level: \_\_\_\_\_

Physical tension / discomfort: \_\_\_\_\_

Body awareness / interoception: \_\_\_\_\_

### 13 SCREENING TOOLS (IF USED)

Tool used (e.g., PHQ-9, GAD-7): \_\_\_\_\_ Tool used (e.g., MoCA): \_\_\_\_\_

Score: \_\_\_\_\_ Interpretation: \_\_\_\_\_

## A Assessment

### 14 CLINICAL SUMMARY

Integrated summary of emotional, cognitive, behavioural, and physiological findings...

**15 DIAGNOSIS**

Primary diagnosis: \_\_\_\_\_

Secondary diagnoses: \_\_\_\_\_

**16 PROGRESS EVALUATION**

Overall progress: \_\_\_\_\_

Response to current interventions: \_\_\_\_\_

**17 RISK FORMULATION**

Current risk level: \_\_\_\_\_

Protective vs risk factors: \_\_\_\_\_

**18 NEUROBIOLOGICAL / BRAIN-BEHAVIOUR FORMULATION**

Dysregulated systems (e.g., limbic hyperactivation, prefrontal underregulation). Top-down vs bottom-up processing patterns. Cognitive-emotional interaction...

**19 EMOTIONAL REGULATION & TRAUMA STATUS**

Window of tolerance: \_\_\_\_\_

Reactivity vs regulation capacity: \_\_\_\_\_

Trauma-related activation: \_\_\_\_\_

**20 COGNITIVE & BEHAVIOURAL PATTERNS**

Cognitive distortions: \_\_\_\_\_

Maladaptive beliefs: \_\_\_\_\_

Behavioural reinforcement patterns: \_\_\_\_\_

**21 ATTACHMENT / INTERPERSONAL PATTERNS**

Relational style: \_\_\_\_\_

Interpersonal dynamics: \_\_\_\_\_

Therapeutic alliance observations: \_\_\_\_\_

**P Plan**

**22 INTERVENTIONS USED (THIS SESSION)**

Techniques applied (e.g., CBT, grounding, somatic regulation, trauma processing). Patient response to interventions...

**23 PSYCHOTHERAPY PLAN**

Ongoing therapeutic approach (e.g., CBT, trauma-focused, integrative neuropsychotherapy). Focus for upcoming sessions...

**24 COGNITIVE & BEHAVIOURAL INTERVENTIONS**

Cognitive restructuring strategies. Behavioural activation / exposure tasks...

**25 REGULATION & SOMATIC INTERVENTIONS**

Breathing exercises, grounding techniques, body-based regulation strategies...

**26 HOMEWORK / PRACTICE ASSIGNMENTS**

Skills to practise between sessions. Behavioural or cognitive exercises...

**27 MEDICATION COORDINATION (IF APPLICABLE)**

Coordination with psychiatrist / physician: \_\_\_\_\_

Observed medication effects impacting therapy: \_\_\_\_\_

**28 SAFETY PLAN**

Crisis planning if needed. Emergency contacts and resources...

**29 FOLLOW-UP**

Next session date: \_\_\_\_\_

Frequency of sessions: \_\_\_\_\_

Monitoring plan: \_\_\_\_\_

**CLINICIAN SIGNATURE**

Clinician name: \_\_\_\_\_

Date & Time: \_\_\_\_\_

Signature: \_\_\_\_\_

Credentials / License No.: \_\_\_\_\_