

Observation Feedback Form: intake/assessment session

Scoring

ABSENT: was not included by student

INAPPROPRIATE: applied, but done so poorly/mistimed/without rationale

BASIC: competent, but lacked some elements

GOOD: competent, and all core elements included

VERY GOOD: competent, at level of skilled and experienced practitioner

EXCELLENT: skilful and effective, even in the face of difficulty

N/A: not an expected feature of session

Criterion	Rating	Comments
Session orientation & structure <i>sets a clear agenda</i>		
Feedback <i>checks in & adjusts practice accordingly</i>		
Theory-driven assessment method <i>asks theory-driven assessment questions</i>		
Interpersonal effectiveness <i>is warm, reflective, boundaried & calm</i>		
Pacing & efficient use of time <i>is goal focused, attentive & empathic</i>		
Questioning skills <i>avoids lecturing & persuasion</i>		
Risk assessment skills <i>session uses coherent theoretical framework</i>		
Capacity & informed consent <i>clearly considered and explained</i>		
Collaboration <i>working as a team</i>		
Conceptual integration <i>uses theoretically coherent formulations</i>		
Session closure <i>Session is summarised & gives hope</i>		
Use of assessment strategies and tools <i>systematically & objectively assesses symptoms</i>		

Assessment/intake session

Criterion explanations

Session orientation and structure

This needs to include mention of the main aim of the session (assessing the suitability of the likely theoretical framework for the client's problems), confidentiality (including its limits), and consent for any recording. The client's preferred name should be established, and the psychologist's name and role should be mentioned, as should the duration of the session. The format of the session should be outlined in brief (asking questions about the main problem, feeding back the psychologist's understanding, and agreeing on what might be maintaining the problem) and this format should be adhered to.

Feedback

The client's and psychologist's understanding of key issues should be helped through the use of **two-way** feedback. The two major forms of feeding back information are through general summary and chunking of important units of information. The use of appropriate feedback helps the psychologist to understand the client's situation, and the client to stay focused.

Features to be considered:

- Frequency of feedback
- Appropriateness of the contents of the feedback
- Manner of its delivery and elicitation

Use of a theory-driven assessment methodology

The questioning strategy adopted by the psychologist should clearly reflect a theoretical model. For example, if the psychologist expects to be working within a broad CBT framework, the psychologist should clearly demonstrate a focus on asking questions relating to the client's different levels of cognition, their emotional experience, the way in which behaviours maintain and/or reinforce these experiences, and the triggers for their current psychological problems. Different theoretical models (such as acceptance and commitment therapy) may have a different emphasis in the information required for a comprehensive, theoretically- driven formulation. In that case, the psychologist should be able to clearly demonstrate that they are collecting information that will be directly relevant to the theoretical model that they intend to be working in. This should be reflected in their questioning style, the measures that they use to augment their understanding of the client's presentation and the way in which they use language to summarise the client's difficulties.

Interpersonal effectiveness

The client is put at ease by the psychologist's verbal and non-verbal (e.g. listening skills) behaviour. The client should feel that the core conditions (i.e. warmth, genuineness, empathy and understanding) are present. However, it is important to keep professional boundaries. In situations where the psychologist is extremely interpersonally effective s/he is creative, insightful and inspirational.

Features to be considered:

- Empathy – the psychologist is able to understand and enter the client's feelings imaginatively and uses this understanding to promote the alliance.
- Genuineness – the psychologist has established a trusting working relationship.
- Warmth – the client seems to feel liked and accepted by the psychologist.

Pacing and efficient use of time

The session should be 'time managed' well in relation to the agenda, with the session flowing smoothly through discrete start, middle, and concluding phases. The work must be paced well in relation to the client's needs, and while important issues need to be followed, unproductive digressions should be dealt with smoothly. The session should not go over time, without good reason.

Features to be considered:

- The degree to which the session flows smoothly through the discrete phases.
- The appropriateness of the pacing *throughout* the session.
- The degree of fit to the learning speed of the client.

Questioning skills

The psychologist should ask predominantly open questions that follow on sequentially from one another. These should be phrased as simply as possible, so that they are easily understood. Multiple, closed and leading questions should be avoided. Questions asked should all be relevant to ascertaining the nature of the main problem or assessing level of risk. They should be sufficient to allow a basic understanding of the client's difficulties. To avoid the questioning feeling like interrogation, summaries should be used regularly.

Features to be considered:

- The extent to which most of the questions are open in nature and relevant to the assessment.
- How much questions follow on logically from one another and from the client's responses.
- Use of summaries to provide breaks in continuous questioning.

Risk assessment skills

The psychologist should ascertain the level of risk posed by the client's current difficulties. Central to this is an assessment of mental state, particularly in terms of depressed mood. Suicide risk should always be checked. It is often important to ask about possible risk to others, either through violence or neglect, especially where children or older people are involved. Further exploration of risk factors will depend on the client's responses; this is one example of when a session may not finish on time, if there are important risk issues that need to be assessed in greater detail. Substance usage should also be assessed routinely, including use of alcohol, prescribed medication, and illegal drugs.

Features to be considered:

- Assessment of the risk of self-harm.
- Assessment of the extent to which the client is a danger to others.
- Substance usage risk factors.

Capacity & informed consent

Psychologists should ensure that they carefully and thoroughly seek the informed consent of clients for all psychological services provided. It should be clear to the observer that the psychologist has used a systematic and recordable approach to ensuring that the client has provided their consent for the psychological service about to be undertaken. Furthermore, the concept of informed consent is underpinned by *capacity*. Whilst there is a presumption of capacity, and also a presumption of the continuance of capacity, in circumstances where the observer notices that the capacity of the client to provide informed consent may be in question, it should be clear that the psychologist has made overt, clear and systematic approaches to the assessment of their client's capacity so that they are able to determine whether the client is able to provide informed consent. In cases of work with children and young people, there should be evidence that the psychologist has sought the *assent* of the client, and the *consent* of a legally authorised decision maker. In cases where the psychologist is working with a mature minor, there should be a very clear attempt to establish whether the young person has capacity to provide informed consent and to receive a psychological service.

Collaborative language and behaviour

The psychologist's stance should be collaborative throughout the session, rather than being either, on the one hand, controlling or, on the other, non-directive. Language involving words and phrases such as 'we', 'us', and 'working together', and behaviour such as offering choice, and sitting alongside the client to share a diagrammatic formulation, are all examples of taking a collaborative stance.

Features to be considered:

- Verbal skills
- Non-verbal skills
- Shared written materials

Conceptual integration

The client should be helped to gain a rudimentary understanding of some of the maintaining factors of his/her problem. The psychologist should do this through use of a diagrammatic initial formulation that includes at least one 'vicious cycle' and that is shared with the client.

Features to be considered:

- Whether a diagram is used to illustrate the conceptualisation
- The extent to which maintaining cycles are consistent with the theory being used to inform treatment

Session closure

The psychologist should bring the session to a close by summarising the client's main problem, making a clear statement regarding suitability of the CBT approach, inviting questions from the client, and asking for feedback on how the client has found the session.

Features to be considered:

- Whether the main problem is succinctly summarised.
- Whether a statement is made regarding suitability of CBT.
- The extent to which client feedback is sought and questions are invited.

Use of standardised assessments

The psychologist should make overt and obvious use of standardised assessment strategies. There should be evidence that the psychologist has approached the objective measurement of the client's psychological difficulties with appropriate tools, informed by a scientist practitioner model. The tools, and their use should be appropriately explained to the client, and where appropriate and practicable, feedback on the client's responses should be provided by the psychologist. When non-standardised assessment tools are used, such as subjective distress scaling approaches, a clear rationale for this approach should be provided, and the client assisted to understand how it can be helpful.