

FOR THERAPISTS

The First Session Checklist

A one-page companion for running a strong first session, whether it is your first ever or your first with a new client. Print it, keep it by your notepad, and work down the columns. The goal is not a flawless performance. It is a present, prepared clinician who makes the room feel safe.

1 Before the Session paperwork + presence

- Intake questionnaire and history completed
- Informed consent** signed; framed as a therapeutic contract
- Privacy notice and, if relevant, telehealth consent
- No-show and cancellation policy, fees stated plainly
- Payment set up; card on file
- Baseline measure ready (PHQ-9 / GAD-7)
- Communication boundaries set: HIPAA-safe channels, hours
- Grounded yourself: breath, a stretch, an intention

2 The First 10 Minutes set the tone

- First 30 seconds:** real smile, warm eye contact, simple greeting
- Settle them: seating, temperature, water
- Welcome with warmth; drop the clinical register if needed
- Brief check-in before any deep work
- Name what the session is for

"How are you feeling coming into today? Before we dive in, I'll walk you through a few things so we're well set up."

3 During the Session listen first

- Walk through consent and roles in plain language
- Set the agenda **together**
- Listen until the client **invites** you to help
- Reflect back; use gentle observations sparingly
- Handle intake as a conversation, not a checklist
- Risk-assess** around the halfway point if indicated
- Normalize nerves and discomfort, theirs and yours

4 Closing & After leave them hopeful

- Reflect back what you heard
- Set goals collaboratively: "What would success look like?"
- Cover practicalities plainly: fees, cancellation, scheduling
- Agree a healthy cadence (often weekly early on)
- Optional small, collaborative next step
- After: brief self-reflection; note what to adjust
- Don't be discouraged if they don't return

+ Adapt to the Room when the client is different

- Telehealth:** tech + privacy check, look at the camera, signal the wind-down early
- Couples:** stay multidirectional; equal airtime; you're not a referee
- Adolescents:** clarify privacy up front; speak to them, not over them
- Mandated:** name it; be transparent about any reporting
- Cultural humility:** ask what would help you understand them better
- Avoid:** rushing to intervene before you understand why they came

Build the alliance from minute one. The first session is where the therapeutic alliance starts, and the alliance is one of the strongest predictors of whether therapy works. Mentalyc's Alliance Genie™ helps you track and strengthen that connection straight from your notes.

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