

Sample Pre-Session Brief + Review Checklist

A fictional brief followed by a reusable worksheet. The sample uses only the dated history listed below, not information from the upcoming appointment.

Sample pre-session brief

Brief detail	Example
Client	DEMO-02, adult
Upcoming appointment	October 1, 2026
Information available through	September 24, 2026
History reviewed	Four selected entries: August 20; September 3, 17 and 24, 2026

Most recent update

On September 24, the client reported continuing pressure from work deadlines. No later update is available in the selected history.

Context across sessions

The client described a difficult work meeting and trouble sleeping before a presentation on September 3. On September 17, she reported feeling drained after a demanding work week. Work is a recurring topic to revisit, not an established explanation of her current concerns.

An open thread

On August 20, the client described little contact with her father for many months and uncertainty about whether she wanted that to change. The later entries contain no update on family contact.

Safety

No safety concerns are documented in the reviewed entries.

Questions to consider

- What feels most important to talk about today?
- How have things been at work since we last met?

- Has anything changed with family that you would like to discuss?

How this brief differs from a pattern-only summary

A summary built around the most repeated topic can read as a conclusion. This brief keeps the same history but presents it as material to check.

Pattern-only summary said	This brief instead
Periods of increased anxiety consistently appear alongside elevated work stress.	Lists the dated work entries and treats work as a topic to revisit, not an explanation.
Recent sessions suggest workplace pressure remains a primary trigger.	States when the latest update was recorded and that nothing later is available.
Nothing about family.	Keeps the August 20 conversation about her father visible as an open thread.

Review checklist

Use the checklist with your own brief in your practice's approved workspace. Complete the blank fields there or on a protected paper copy.

Review detail	Your entry
Client / record reference	
Appointment date	
Information reviewed through	
Reviewed by / date	

- ☐ **Is the pattern supported?** Locate the supporting entries. Do not equate repetition with importance or causation.
- ☐ **What is missing?** Check unresolved issues, contradictions and less frequently documented context.
- ☐ **Is it still current?** Check dates and distinguish recent updates from older concerns.
- ☐ **Fact or interpretation?** Separate documented information from inferred meaning.
- ☐ **Will it steer the session?** Keep questions open and leave room for the client's current concerns and your clinical assessment.

Review notes

What to carry forward	Your note
One assumption to verify	
One question to explore	

This is a preparation aid, not a full assessment or a validated clinical instrument. The sample illustrates one possible brief structure, not a required format or a verified product-generated output.