Initial assessment and the first session

What CRPO asks of the first meeting (Competency 4.1, consent, fees), how to assess and set goals (4.4, 4.5), when not to proceed, what goes in the record, and CRPO's own exam tip on time.

Study aid, not legal advice. Last verified against the official sources linked below on 11 November 2026.

1 On the exam (CRPO's words)

- CRPO's blueprint: making an initial assessment and establishing a working relationship are each **at least 10 to 15%** of the assessment.
- CRPO's **tip 3**: when a question names a time, for example this session or the next, select only the responses that belong to that time.

2 Orient the client (4.1)

- **4.1**: your education, qualifications and role, and how it differs from other professionals; what each of you is responsible for; the advantages and disadvantages of therapy; privacy, confidentiality and its legal limits; your rules and policies; the client's questions; informed consent, as the law requires.
- Consent only once the client understands the process, its possible benefits and risks, other options, and what not proceeding means (**3.2.3**).
- Your fee schedule, before services begin (**6.1.1**), including any charge for late cancellations or missed appointments (6.1.4).

3 Assess (4.4, 4.5)

- **In their words**: what brings them now, what they hope for, and what has helped before.
- **Risk** as indicated: to self, from or to others, and medical (4.4a).
- **Strengths**, vulnerabilities, resilience and resources, and their context (4.5b, 4.2c).
- **Formulate** an assessment, then develop goals and objectives with the client and a direction for therapy (4.5g to 4.5i).

4 When not to go ahead

- Recognize when therapy is contraindicated (**1.2c**), for example when safety or an unmanaged medical issue must come first.
- Offer only what is within your competence (**2.1.2**).
- Refer when specialized treatment may benefit the client, in a reasonable time (**4.6b**, 4.6c).

5 Before the client leaves

- [ ] Consent discussed and recorded, with the date and how it was given (3.2.6).
- [ ] Limits of confidentiality explained.
- [ ] Risk asked about, and a plan if needed.
- [ ] Fees, cancellations and how to reach you between sessions.
- [ ] Next steps agreed together.

6 What goes in the record (5.1)

- **Client profile**: name, address, phone numbers, date of birth, any substitute decision-maker, and who referred them and why, or that they self-referred.
- **Assessment**: methods, results, conclusions and problem formulation.
- **Plan for therapy**: the direction therapy will take and the client's consents.

Orient, ask, assess, agree: the first session sets up consent and the work that follows.

Official sources: CRPO Entry-to-Practice Competency Profile (4.1, 4.4, 4.5) and CRPO Standard 3.2: Consent and CRPO Registration Examination Resource Manual. Condensed from Therapeutic Process and Client-Therapist Relationship. Independent study aid, not legal advice, not affiliated with CRPO or COMPASS.