

Your treatment review

Before the appointment: what I want to share

For adults. Fill in only what is useful and bring this to your appointment.
Keep your notes private. This is a conversation aid, not a symptom test.

1. My main concern and what I hope to change

One everyday thing I would like to do more easily:

2. What has changed - and what has not

Mood, sleep, energy, concentration, daily life, any improvements or new difficulties:

3. What I have tried

Medication or therapy, approximate dates, benefit, side effects, missed doses or sessions.
Bring a separate medication list with names and doses from the labels, including supplements.

4. What gets in the way of care

For example: cost, travel, time, waiting lists, side effects or difficulty keeping appointments.

5. Anything else I want my clinician to know

Changes in health or circumstances, past mood patterns, or questions I find hard to raise:

If you live with bipolarity, include that in the conversation. Do not change or stop prescribed medication on your own. If you feel unsafe or face an immediate danger, use your local emergency or urgent mental health service.

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During the appointment: questions and a shared plan

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Questions I can choose from

- ☐ What progress should we expect, and how will we assess it?
- ☐ What might need reviewing about my current care or wider health?
- ☐ What options could fit my needs, and what are their benefits and risks?
- ☐ What would the costs, appointments and practical demands be?
- ☐ Would specialist advice or another opinion be useful?
- ☐ If I am interested in research, how might a study affect my usual care?

Our agreed next step

The plan, who will do what, and anything I want clarified:

When and how we will review progress

Date or timeframe, appointment arrangements and contact details:

Who to contact if I need help sooner

Ask what changes need an earlier review and what to do outside opening hours:

This worksheet does not recommend treatment and has not had an individual clinical review. Prepared by HopeStage, informed by NIMH's guidance on talking with a health care provider. No endorsement is implied. Research participation is optional and does not guarantee treatment or benefit.