

Worksheet

US English

Boundaries – Self-Monitoring Record



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Description

Self-monitoring is a technique in which clients learn to systematically observe and record specific targets such as their own thoughts, body feelings, emotions, and behaviors. The aim is to improve clients' awareness of their experiences and the contexts in which they occur, in order to help them gain insight into their symptoms and difficulties. Self-monitoring supports collaboration between the therapist and client, and creates opportunities to formulate and test hypotheses about these difficulties. Self-monitoring is usually introduced early in therapy, and provides an inexpensive and continuous measure of problem symptoms and behaviors throughout treatment.

Psychology Tools self-monitoring records have been carefully designed to focus on particular targets. In most instances, there are:

- **Regular** versions of each form which focus on collecting essential data about the target.
- **Extended** versions of each form, which allow additional data to be collected about the consequences of client behaviors, and which can be used to form hypotheses about reinforcing factors.

What is self-monitoring?

Self-monitoring functions as both an assessment method and an intervention (Korotitsch & Nelson-Gray, 1999; Proudfoot & Nicholas, 2010). Routinely used in cognitive behavioral therapy (CBT), it contributes to a wide variety of evidence-based treatments (Persons, 2008; Korotitsch & Nelson-Gray, 1999), and is comprised of two parts – discrimination and recording (Korotitsch & Nelson-Gray, 1999).

Discrimination consists of identifying and noticing the target phenomena. This can be challenging for clients. It may be the first time that they have brought attention and awareness to their symptoms, thoughts and emotions, and some clients express concern about 'doing it right'. Therapists can simplify the exercise by asking the client to record only whether the targets are present or absent, or by varying the questions they use to probe these thoughts and feelings. For example, instead of focusing on more difficult-to-capture thoughts and mental images, clients might be instructed to monitor more salient body sensations or behaviors (Kennerley, Kirk &

Westbrook, 2017).

Recording is the process of documenting occurrences, usually through some kind of written record. Using a record allows clients to self-monitor: to discriminate the target (e.g. a feeling of anxiety), record it (e.g. when it occurred, how long it lasted, where they were and what they were doing), and review it (e.g. how often did it happen in a week, what was common across different episodes).

Self-monitoring can be accomplished using many different tools:

- **Diaries** can be used to record information about when events occur, such as activity, sleep, or pain.
- **Logs** can be used to record the frequency of events, behaviors, thoughts, or emotions.
- **Records** can be used to record information about thoughts, memories, symptoms, or responses.

In practice, much of this terminology is interchangeable. For the purposes of this and other Psychology Tools resources, the term 'Self-Monitoring Record' will be used.

Why practice self-monitoring?

Clients are encouraged to actively participate in cognitive-behavioral treatment, so that they will develop the skills and knowledge to help them to address their difficulties. Introducing clients to self-monitoring is a straightforward way to begin this process.

Self-monitoring supports client engagement and motivation by fostering a sense of self-control and autonomy (Bornstein, Hamilton & Bornstein, 1986; Proudfoot & Nicholas, 2010). It helps clients to understand how and why these difficulties developed, and how they are maintained. This lays the foundation for intervention. Self-monitoring records can also be invaluable in helping therapists and clients identify controlling or influential contextual factors, which may not be immediately apparent during therapy sessions, or in the therapy room (Korotitsch & Nelson-Gray, 1999).

Data from self-monitoring records will often form the basis of case formulation and intervention planning (Cohen et al, 2013;

Proudfoot & Nicholas, 2010). Different forms of self-monitoring provide different kinds of information, which can serve different purposes. For example:

- Self-monitoring data can help to define a problem hierarchy by identifying which problems occur most frequently, or which most severely affect a client's wellbeing.
- Data from self-monitoring can be used to identify unhelpful patterns or styles of thinking (e.g. rumination, catastrophizing), or to examine the domains of a client's preoccupation.
- Self-monitoring can be used to explore the context or triggers for a particular thought, feeling, or behavior.
- Self-monitoring can highlight specific coping or avoidance behaviors that the client uses to manage their feelings.

When should self-monitoring be practiced?

Self-monitoring is often taught early, during the assessment stage of therapy. It can be particularly useful when the target phenomenon is covert and cannot be observed by anyone but the clients themselves (Cohen et al, 2013). Examples of covert targets include rumination, self-criticism, or self-harm.

Early in therapy, clients may be asked to complete simple self-monitoring tasks, such as noting the frequency of particular behaviors or emotions. This can then develop into more sophisticated records that explore the triggers, thoughts, and consequences linked to specific events. As the intervention progresses, self-monitoring can be used to track adherence (e.g. how often a client uses a new strategy or adaptive coping technique) and the effectiveness of an intervention (e.g. how often the client now experiences problem symptoms, or implements new responses).

How is self-monitoring conducted?

Self-monitoring should be completed by the client during or shortly after an event. If the client may find it difficult to access their thoughts or emotions, self-monitoring can begin by focusing on more tangible experiences, such as body sensations or overt behaviors (Kennerley, Kirk & Westbrook, 2017). The target of self-monitoring should be discussed and agreed with the client using specific definitions and examples, with discrimination and recording first practiced in-session until the client feels confident.

“Formal monitoring is distinct from casual observation. It requires a commitment on the part of the therapist and the patient to think through what monitoring is needed and to consistently assess a variable or variables, collect the data, and use the data to inform the formulation and treatment plan”

(Persons, 2008, p.183)

Effective training uses clear and simple instructions that can be easily revisited. It has been shown that the accuracy of self-monitoring decreases when individuals try to monitor more than one behavior, or complete concurrent tasks (Korotitsch & Nelson-Gray, 1999). Therefore, the therapist and client should identify a single, well-defined target for monitoring, model and practice completion of the record, and emphasize the importance of repeated practice (Korotitsch & Nelson-Gray, 1999).

Accuracy also improves when clients are aware that what they record will be compared with therapist observation or checked in some way (Korotitsch & Nelson-Gray, 1999). To support this, self-monitoring records should be reviewed in each session and the data should contribute to client-therapist collaboration, formulation and intervention planning.

If a client experiences repeated difficulty with completing self-monitoring, the therapist should consider the following (Korotitsch & Nelson-Gray, 1999):

- What is the client’s understanding about why they are being asked to practice self-monitoring? Do they see value in self-monitoring?
- Is there anything about the client’s current situation and environment that could be interfering with self-monitoring?
- Are too many targets are being monitored?
- Does the client need additional in-session practice?
- Would a different type of assessment or recording be more suitable for this client?
- Is the client avoidant of particular experiences?
- Does the client hold beliefs which might interfere with self-monitoring? (e.g. beliefs about doing things ‘perfectly’)?

The *Boundaries – Self-Monitoring Record* worksheet is designed to help clients capture information about situations where someone in their life overstepped a boundary. It includes columns to record information about: situational context; thoughts about the boundary violation; emotional and physiological responses; and coping responses. An additional ‘extended’ version of the form includes a column for recording the consequences of these coping responses, which may help therapists to generate hypotheses about how the client’s existing coping strategies contribute to their reactions to further boundary violations.

Instructions

“A great way of finding out more about your experiences of these difficult thoughts, feelings, and reactions is to use a Self-Monitoring Record. It’s like a diary that lets you record when problems happen, and any important details which could help us understand more about how it works. Would you be willing to go through one with me now?”

Step 1: Choosing a focus, purpose, and prompt for data collection

Self-monitoring records are best used to capture information about specific categories of event that are of interest to the client, or related to a presenting problem. The accuracy of self-monitoring decreases when individuals try to monitor for more than one target, so therapist and client should identify a single well-defined target (e.g. “Times when someone asks you to do something that you don’t feel comfortable doing”, “Times when someone pushes you to break one of your rules”, “Times when other people don’t pay attention to your preference”). Self-monitoring is most helpful when it is completed as soon after the target event as possible, while the client’s memory of what happened is still clear. Consider asking:

- If we’re trying to understand more about your boundaries, what kind of situations might it be helpful to collect some data about?
- When will you fill in this self-monitoring record? What will your prompt or cue be?

Step 2: Situation

Whenever the client notices their individual prompt for completing a self-monitoring record, they should be encouraged to start by recording information about the situation which has given rise to that experience. Relevant contextual information might be factual (e.g. date, time, location), externally focused (e.g. things that they could see, hear, touch, smell, taste), or internally focused (e.g. thoughts, images, memories). Helpful questions might include:

- Who were you with? What were you doing? What was happening? Where were you? When did it happen?
- What was the other person doing that crossed one of your boundaries?
- Was anyone trying to make you do anything? What were they wanting you to do?
- What was it about the situation that made you feel like one of your ‘red lines’ had been crossed?

- What made you to start <thinking/feeling/experiencing> that?

Step 3: Thoughts

A core tenet of the cognitive behavioral approach is that people's emotional and behavioral reactions to an event are driven by their appraisals of that situation ("what you think affects the way you feel"). It is important to help clients notice and identify their automatic thoughts, interpretations, and predictions. Any automatic images or memories that clients experience can also be probed for meaning:

- What went through your mind when you became aware of <the trigger>?
- When you noticed <the trigger>, what did you think was going to happen? (prediction)
- What mental images (pictures in your mind) or memories did you notice when that happened?

Step 4: Emotions and body feelings

Self-monitoring records provide opportunities to educate clients about the cognitive behavioral model, and specifically the links between thoughts, emotions, physiology, and behavior. Clients can be helped to explore their emotional response to their interpretation of what happened, and to the events themselves. In some circumstances, it can be helpful to enquire whether the client had any automatic thoughts about their emotional/physiological reactions. Helpful questions might include:

- How did you feel emotionally when you had that thought?
- That sounds like a real dilemma. How did you feel?
- How strong was that feeling at that moment? Could you rate it on a scale from 0 to 100?
- When you had that feeling, what went through your mind?

Step 5: Responses

The final step is to explore how the individual responded to the situation, their appraisal of what was happening, and to their emotional and physiological responses. Behavior can often be helpfully framed as 'coping responses' or 'things you did to

cope with feeling that way'. Consider asking:

- How did you react to that boundary being crossed?
- Did you appease the other person at all?
- What did you do to cope when you <thought/felt> that?
- How did you react to feeling that way?

Step 6: Consequences (Optional)

The extended version of the *Boundaries – Self-Monitoring Record* worksheet includes an additional column for clients and therapists to explore the consequences of the client's coping strategies. This step is not recommended when clients are in the early stages of practicing self-monitoring, as it introduces unnecessary complexity. However, exploring the consequences of an action can aid understanding of why particular patterns of behavior persist. Some behaviors might lead to positive feelings (e.g. saying 'yes' to people's requests can make them happy, and can make you feel happy to be helping), some might lead to the removal of an unwanted feeling (e.g. conceding to an unreasonable demand can [temporarily] resolve an awkward situation), and others might have positive short-term consequences and negative long-term consequences (e.g. going along with a group can help you to feel accepted, but may lead to regret if it leads you to break one of your own rules).

Prompts could include:

- How did you feel when you did that? (emotionally and in your body)
- How did other people react when you did that?
- How did you feel (a) right away and (b) later?
- What impact did responding in that way have on you?
- Do you know anyone else who would have reacted differently in that situation?

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Boundaries – Self-Monitoring Record

Boundaries are rules that you set for yourself about how other people are allowed to treat you.

Situation Describe the situation where someone overstepped a boundary	Thoughts What went through your mind? (Thoughts, images, or memories)	Emotions & body feelings What did you feel? How strong was that feeling? (0–100%)	Responses What did you do? How did you cope with those feelings?
<p>Who were you with? What were you doing? Where were you? When did it happen?</p>	<p>If it was an image or memory, what did it mean to you?</p>		

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Monday 11:30 my friend asks if she can come and stay with me and my family in our small apartment for three weeks.	I can't say no or she will think I'm a bad friend.	Anxious – 60% Confused Tense	Say yes and worry how we will cope with so many people in the apartment.
Wednesday 12:00 my adult daughter expects me to look after my grandson three days a week.	I can't cope but I don't want to let her down. I can't say anything because she'll fly off the handle at me and might even stop me from seeing them.	Fearful – 80% Scared	Don't say anything.
Friday 11:00 my boss has asked me to act as the manager but hasn't paid me for the extra work for months.	It's not fair. I'm doing so much more and staying late but not getting paid for it.	Annoyed – 80% Anxious – 30%	Set a boundary: let them know that I would like to go back to my old role or get back-dated pay for the work I have done.
Who were you with? What were you doing? Where were you? When did it happen?	If it was an image or memory, what did it mean to you?		

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Wednesday 12:00 my adult daughter expects me to look after my grandson three days a week.	I can't cope but I don't want to let her down. I can't say anything because she'll fly off the handle at me and might even stop me from seeing them.	Fearful - 80% Scared	Don't say anything.	I feel exhausted and I can't sleep because I'm so worried.
Friday 11:00 my boss has asked me to act as the manager but hasn't paid me for the extra work for months.	It's not fair. I'm doing so much more and staying late but not getting paid for it.	Annoyed - 80% Anxious - 30%	Set a boundary: let them know that I would like to go back to my old role or get back-dated pay for the work I have done.	I felt good for being assertive. They said no and so I've found another job!
Who were you with? What were you doing? Where were you? When did it happen?	If it was an image or memory, what did it mean to you?			

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