

# Notes Checklist

**Include each area in every note (as applicable), regardless of your preferred template:**

- Theme/topics of the session (rather than details)
- Client presentation in session (consider what was seen, heard, observed)
- Your interventions
- Your assessment of progress (or lack thereof) in relation to overall treatment
- Plan for follow up
- Next session scheduled

**Optional/As needed:**

- Changes or adjustments to diagnosis/treatment plan
- Medical necessity statement
- Suicide or risk assessment and crisis plan created
- Client quotes
- Conversations with collaterals
- Other: \_\_\_\_\_

# Meaningful Notes

Use these prompts to help write your notes.

## **Reflection-based Template**

Why did my client come to see me originally?

Why do they continue in treatment?

What was our main focus today?

## **Results-based Template**

What did my client identify as their goal originally (in the first session)?

What would my client say is their current goal and how does that relate to their original goal?

How did we work toward those goals today?

## **Motivation-based Template**

How is my client currently motivated to change?

What is hindering and what is fueling their motivation?

How did we direct their motivation today?

## **Positivity-based Template**

What positive attributes did your client display today?

What is keeping your client from recognizing or expressing these positive attributes regularly?

How will your client implement these attributes in their everyday life?

## **Skills-based Template**

What was your client's focus today?

How was your client's focus today?

Which skills will your client be able to implement over the next week?

## **Relationship-based Template**

In what way is the relationship currently progressing?

What are the hindrances to harmony and collaboration?

What are the strengths to use as support for the relationship?

# Note Writing Prompts

Use these prompts to write notes *with* clients.

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## **Reflecting on today**

Why did I originally come to counseling?  
Why do I continue in counseling now?  
What was our main focus of the session today?

## **Focus on results**

What did I identify as my goal for counseling when I first came in?  
What is my current goal and how does that relate to the above?  
How did we work toward those goals today?

## **Monitoring motivation**

How am I currently motivated to change?  
What is hindering and what is fueling my motivation for this change?  
How did we direct that motivation today?

## **Reviewing Strengths**

What positive attributes did I display today?  
What is keeping me from expressing these positive attributes in my every day life?  
How can I implement these attributes in my life over the next week?

## **Implementing Skills**

What was our main focus today?  
How was my focus and attention in session today?  
Which skills did we review that I will be able to implement over the next week?

## **Improving the relationship**

In what way is the relationship currently progressing?  
What are the hindrances to harmony and collaboration?  
What are the strengths to use as support for the relationship?

# Sample Notes

## Narrative Format

### Intake Session Example

Reviewed limits to confidentiality, potential benefits and drawbacks to therapy, potential telehealth limitations and other policies. Obtained consent for treatment.

Reviewed with client intake assessment form and symptoms questionnaire. Discussed reason for seeking therapy and gathered biopsychosocial history. Client's goal is to discover personal strengths and how to use these in current job, while also focusing on non-medication strategies for addressing ADHD. Discussed how to implement these goals in counseling over the next four weeks and will revisit treatment plan at that time. Identified one goal to work on prior to next session (sleep schedule) and provided online resources for follow-up reading on the topic.

Next session is planned for 02/22/17 at 4pm.

*Note: I do not go into details here regarding the biopsychosocial because I have that information inside that form. No need to do double work!*

# Sample Notes

## DAP Format

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### Client with Anxiety

**Data:**

Client presented to session as jittery and reported feeling excited to share status of past week. Spoke quickly and initially had difficulty practicing techniques in session but was able to report herself as feeling a 3 out of 10 on the anxiety scale by end of session.

**Assessment:**

Client was successful in practicing techniques consistently over the last week and felt proud of her accomplishments but was initially unable to recognize her heightened state. Continues to show improvement in reducing reported level of anxiety within 10-15 minutes of mindfulness exercises practiced in session.

**Plan:**

Client will continue to practice techniques daily and report on progress. Next session scheduled for 02/23/17 at 6pm.

# Sample Notes

## GIRP Format

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### Play Therapy

**Goal:**

Client will reduce social anxiety at school from five days a week to two days a week.

**Intervention:**

Therapist used dolls to guide client in identifying triggers to anxiety and how anxiety feels in the body. Demonstrated dolls using breathing techniques and then practiced with client.

**Response:**

Client engaged with dolls and was able to identify the trigger of "people looking at her." She also identified multiple ways in which anxiety feels for the doll but denied having these feelings herself. Initially was apprehensive about breathing techniques but was able to implement once told she needed to learn them in order to teach the doll.

**Plan:**

Client and mother will identify feelings each morning and afternoon using feeling chart on the fridge. Client will practice teaching her dolls at home the breathing techniques.

# Sample Notes

## Forgotten Note

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In case you are trying to write a note from months ago but can't remember what transpired during session, here is a template you can use that confirms the client attended session but avoids further details.

*Note: If you remember more details later on you can always write an "addendum" to the note and add those details so you have a more complete note! But for now, just write a note and move on rather than trying to force yourself to remember.*

"Client attended session. Addressed treatment goals and no unusual circumstances present. Scheduled next session for mm/dd/yy."