

Writing
Meaningful
Notes

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How many of you have
"ideal" notes?

Here's a secret...

Most of us DON'T have
ideal notes!

Paperwork Success

No late nights

No working from home

*Consistent and positive
feedback on paperwork*



CYA

Common Scenarios of Sharing Notes

- Board investigation
- Client court cases
- Insurance audits

What if **notes**
were about
more than CYA?

What if...

Having good, **meaningful notes** could *transform* your relationship with your clients?

Writing good *notes* could make you a **better therapist?**



Today's Objectives

- Case note templates
- Strategies for note writing
- Making notes a collaborative process

>> Notes may seem boring but I *promise* we'll make it **fun!**

Paradigm Shift

Paperwork is *not* punishment.

Note writing can be a **powerful tool** for yourself *and* your clients.



What is your
biggest struggle
with writing notes?

“I never got training on documentation.”

-Every therapist ever!

APA Ethics Code

- “maintain, disseminate, store, retain, and dispose of records and data relating to their professional and scientific work in order to...”
- (1) facilitate provision of services later by them or by other professionals, (3) meet institutional requirements, (4) ensure accuracy of billing and payments, and (5) ensure compliance with law

Meaningful Notes

A new way of looking at notes



Meaningful notes enable you to see:

- Progress
- Patterns
- Process

Clinical benefits of meaningful notes:

- Further progress in treatment
- Improved client retention
- Increased client engagement
- Increased communication
- ***Empowered clients***

Before you write notes...

- Prepare
- Reflect
- Visualize

Do you **schedule**
time each week for
writing notes?

One of the most important things you can do to make notes **easier and better quality** is to be **REALISTIC** about the time needed to get this task done.

Shame corrodes the
very part of us that
believes we are
capable of **change**.

-Brené Brown

Potential Note Templates

- **DAP**- Data, Assessment, Plan
- **GIRP**- Goal, Intervention, Response, Plan
- **PAIP**- Problem, Assessment, Intervention, Plan
- **SOAP**- Subjective, Objective, Assessment, Plan

Potential Note Templates

Narrative Notes:

- **Reflection** based
- **Relationship** based
- **Results** based

Important Reminders

- No one “perfect” way to write notes
- No “perfect” template or formula
- Find a style that **works for you**



Sample Notes **Handout**

Most Common Mistakes

What you want to avoid



Writing too much

- Unnecessary details
- Difficulty reading through documentation later on
- Spending too much time on notes

Too Long

D: Client arrived 5 minutes late to session. She was dressed up nicely with a yellow sundress and looked attractive. As soon as she sat down she began complaining about a recent date and talked about how he slurped his spaghetti and noted she is feeling like she will never find another man with whom she can live. She reported feeling like dating is useless and she may as well get used to the fact that she'll be an old maid. She did this for quite some time before I stopped her. She began to cry for about five minutes and appeared inconsolable. She was then able to talk about her feelings of loneliness and get to the root of what was really going on.

A: Client continues to value herself based on her marital status and feels both guilty for dating so soon after her divorce and hopeless that she will not find another husband. She continues to not value therapy by arriving late to sessions and having trouble ending session on time. She is engaged throughout each session but often makes excuses rather than evaluate underlying reasons for her behaviors.

P: Client will arrive to session on time in one week, on 09/19/2016. She will journal regarding her feelings of identity and self-worth related to marriage and bring to next session.

Writing too little

- The fear of having notes read in court
- Notes are no longer serving *you*
- Notes are unable to serve your client

Too Short

Fifth session with client. Discussed feelings related to dating and identity. Assigned journaling exercise for the next week.

Over focusing on insurance

- Not personalizing the documentation
- Spending too much time on documentation
- Allowing insurance to impact self-care and job satisfaction

Under focusing on insurance

- Viewing the diagnosis as arbitrary
- Not including medical necessity
- Focused on a couple rather than an individual

Falling behind in notes

- Keep a realistic schedule
- Know how long it takes you to write a note
- Don't overestimate your memory
- Have clients fill out paperwork ahead of time

NEVER write the same thing
twice!

How would you feel
about writing notes
with your clients?

What is your
biggest concern
about showing notes
to your clients?

Collaborative Documentation

Hear me out!



What is Collaborative Documentation?

- Writing notes *with* your clients
- Using notes as a **collaborative** experience
- Allowing clients **access** to their notes

Collaborative Documentation: Outcomes

- Increases **client engagement** in therapy
- Works especially *well* with “resistant” clients
- Reduces concerns around **stigma**

Your clients will
never be **surprised**
about what they see
in their records.

When given the option, most clients *and* therapists preferred to **continue** the process after 8 weeks.

My Experience

- Kept me accountable
- Shared resources easily
- Reduced distraction during sessions
- Reduced my own stress about records requests



Collaborative Documentation

- Have realistic expectations
- Implement *thoughtfully*
- Evaluate after **6-8 weeks**

Next Steps

*How will you **implement** what we covered today?*

Start *Today*

- Use your template
- Use the cheat sheets
- Determine how to feel *better* about notes



What is going to
stop you?

~~Punitive~~

Empowering

Your paperwork *can*
improve your
relationship with
clients.

Your Notes...

- Are there to **support** your clients
- Are there to support *you*
- Provide valuable insight

The Result

- **Empower your clients** *so they are more involved*
- **Discuss potential barriers** to treatment *openly*
- **Review progress** with clients *consistently*

The Result

- **Have tangible examples** of the *change you help people create*
- **Keep more clients** *because they are engaged*
- **Grow your practice** through *referrals*

Keep talking about note taking!!!

- How it impacts our **work**
- How it impacts our **profession**
- How it impacts our **clients**
- With *colleagues*
- With *supervisees*



“As a shame researcher, I know that the very best thing to do in the midst of a shame attack is totally counterintuitive:

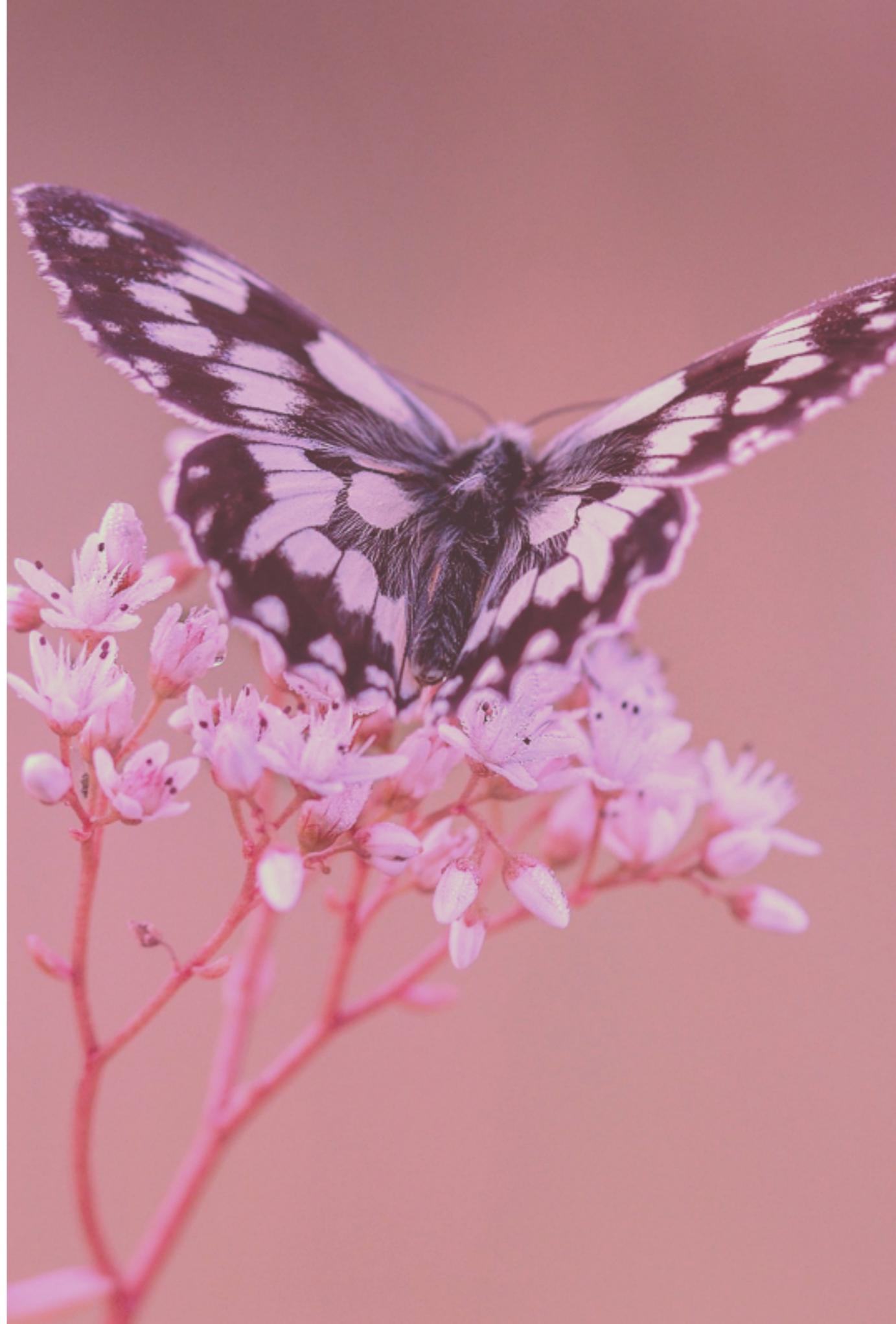
Practice courage and reach out!”

–Brené Brown

Be mindful of the *mindset shift* and the **language you use** to describe documentation so that you are *contributing* to a **solution.**

We chose this profession to *help and support* people.

Let's also **empower** them.



Thank you!

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Questions?