

Writing Concise Notes

Lisa Nosal, LMFT

April 5, 2022

What do I include in my note?

- Themes of the encounter
 - What was the main thing(s) I did?
 - What are the main things the client is taking away?
- How does this relate to what we've been working on/goals?
- Crisis/Risks



Themes of the Encounter: Interventions

- What did we mostly talk about? Pick just a few major topics!
 - Did we talk about something central to the client plan goals?
 - Did I do something that led to a specific insight or breakthrough?
 - Was there something I explained in detail or taught my client?
- What was my main clinical goal? Maybe:
 - Increasing the client's independence
 - Coaching on interpersonal skills to help the client's family functioning
 - Helping the client process a big emotional event
 - Modeling non-violent communication skills
 - Supporting the client in identifying needs or emotions
 - Giving the client practice in stating their needs or emotions
 - Coordinating housing resources with the client and family

Themes of the Encounter: Responses

- What did the client mostly take away? How did their thinking change?
- What did they make the most progress on, or work the most at?
Maybe:
 - Showed much more confidence in completing their morning routine
 - Said they were going to try using “I” statements at their visitation this weekend
 - Reported their anger went from a “10 out of 10” at the start of the session to a “4 out of 10” by the end
 - Noticeably slowed down their speech and shifted to talking about their own feelings rather than other people’s
 - Struggled with naming their own anger but said “my stomach feels fluttery”
 - Said “no” to any suggestions of their own needs but would agree that they want ice cream some time this week
 - Were concerned they might not be able to afford housing options

How does this relate to what we've been working on?

- How is this likely to help the client progress toward their goals?
- While you don't have to document the client plan goal exactly, or every time, it can be helpful to think it through in your head
- Supports the "Golden Thread" of documentation
- Intervention: Continued working on Sam's goal of maintaining housing with his family by role-playing interpersonal skills.
- Response:
 - Sam reported feeling more confident in trying these skills this weekend.
 - Sam got really frustrated and started shutting down emotionally and verbally.

Crises & Risks

- If there is a major risk, document it
- If there was a major risk, or you were assessing for a major risk, document your assessment (including your conclusion)
- If there's an ongoing risk, document:
 - What you've already done to manage it (e.g., Who did you inform?)
 - What your next steps are (e.g., Who will you consult with? Who will you notify?)

Your Turn!

- How do you identify themes in your interventions or in clients' responses?
- How do you decide what to include in your notes?
- What sorts of information do you feel ok leaving out leaving out?



T H I N K

Progress

N O T

Perfection