**Clinical Record Keeping**

*Bottom Line:*

If it’s not recorded, it didn’t happen.

*Rule of thumb:*

Less is more; but when risk is involved, more is more.

**Documenting Contacts**

1. Phone calls
   1. Date, time, length of call
   2. Person you spoke to & phone number
   3. Summary of call
   4. Include if you left a message or if no voicemail was available
   5. Signature
2. Letters/Emails:
   1. Copy of letter/email and response
   2. Signature
3. Disclosures
   1. If you contact someone *without a Release of Information form*, you need to record it in the “Accounting for Disclosures” form in TheraNest.

**Treatment Plans**

1. Goals (What do you want out of therapy?)
   1. S
   2. M
   3. A
   4. R
   5. T
   6. (It’s ok to have one goal.)

***PRACTICE –*** *Change these to SMART Goals*

“I just want to feel better.”

“I want to stop fighting”

“I want her to do better at school.”

**Progress Notes (Within TheraNest)**

**B I R P**

1. Session Focus
2. Therapeutic Intervention (and Response)
   1. Explain what you did in session to move your client toward their goals.

*Possible words to use:*

Processed.. Reviewed…

Problem-solved… Addressed…

Taught/Educated client…

Used \_\_\_\_\_\_\_\_ skill….

* 1. Include the client’s *response* 
     1. initially resistant
     2. actively engaged
     3. compliant
     4. verbalized agreement
     5. expressed gratitude
     6. bowed down and worshipped the therapist

1. Planned Intervention
   1. Should be related to treatment plan
   2. Check in on homework if given.
2. Mental Status
   1. Use these
      1. At initial session (to give baseline)
      2. When they exceed normal limits (e.g. depressed)
      3. When it contradicts what’s expected given the content of the session
      4. When it shows a change/progress
   2. Using mental status with couples
   3. Don’t use names!

**Risk Assessment**

1. Document reasons why you believe risk is present
2. Document intervention
3. Document consultation
4. Consider it reasonable to assess for risk if your client has experienced:
   1. Relationship break ups/Rejection
   2. Lack of sleep
   3. Depressed mood
   4. Unexpected loss of job, housing
   5. Recent trauma

**Mandatory Reporting**