



Termination Summary

For every client that we see for more than one session, we complete a termination summary. The purpose of a termination summary is for *professional communication*. After termination, your client may request a copy of their therapy records. The request may be for legal purposes, for a subsequent therapist, or for medical records of some kind. In all of these cases, a professional (e.g. lawyer, doctor, therapist) will be reading the records to see what was accomplished and what is yet recommended.

In most cases, when someone requests records, Envision will only send a termination summary. (Can you imagine a professional reading through all your notes?? Not likely.) Of course, if the court subpoenas a complete file, we have to send the complete file. But we rely heavily on the termination summary. Here are instructions on how to complete one well.

1) **Client name, date of birth, address, and phone number** – filled out automatically in TN.

2) **Identifying information** includes (but not limited to):

- Race (e.g. Caucasian, multiracial, latino/a, African-American, etc.)
- Spirituality if applicable (e.g. Christian, Muslim, Mormon)
- Sexual orientation (e.g. heterosexual, gay, lesbian)
- Marital status (e.g. single, divorced, widowed, married)
- Age bracket (e.g. child, adolescent, adult, elderly adult)
- Gender (if identifies as transgender, used descriptive language e.g. natal, MtF, etc.)

Example: Caucasian, Christian, heterosexual, married, adult female.

3) **Presenting Problem:** This is a summary of what brought them into therapy. Use the client's words (often on the Client Information form) when possible. Use quotation marks when using the client's words.

4) **Treatment Diagnosis:** Use this only if you've given them a diagnosis. Include the DSM-V code and the full diagnosis name. If you haven't given a diagnosis (often the case with marital therapy), say "None."

Example: 296.32 Major depressive disorder, recurrent episodes, moderate

5) **Number of Sessions:** You can find this in TheraNest – when you search for a client, it has "total kept appointments."

6) **Goals of Counseling:** This comes directly from your treatment plan.

Example (for a couple): 1) Reduce conflicts to once per week. 2) Increase use of emotional regulation skills to two per conflict. 3) Use brainstorm technique once a week.



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7) Progress Made: Speak directly to the goals that you were working toward. Don't be afraid to include if the client did not make progress, or made progress then regressed. This is important information.

Example (for a depressed client): 1) During the course of counseling, client increased her mood as evidenced by self-report, more positive affect, higher BDI score... 2) Client regularly reported practicing positive coping skills, such as exercise and connecting with friends.

8) General Therapeutic Approach: Give a basic idea of how you worked with the client so that a subsequent therapist can have an idea of what worked or what didn't work.

Examples: Couples therapy, with intermittent sessions with one spouse.
Individual therapy, using CBT integrated with spirituality
Individual therapy, with EMDR and DBT skills
Group Therapy

9) Hospitalizations during Treatment (New Field): List if the client was hospitalized, the hospital attended and general length of time. This is also a good place to include Intensive Outpatient care and Partial Hospitalization Programs (IOPs and PHPs).

10) Reason for Termination

Examples: Client met therapeutic goals.
Client's finances prevented further treatment.
Client proceeding with divorce.

11) Recommendations: This is the field where you can say what you think is needed to meet *their* therapeutic goals. Less is more – "None" is the most often used recommendation.

Examples: Further individual therapy, neurological testing, couple's therapy, etc.

12) Financial Status at Closing: This should almost always be \$0. If not, it alerts the next professional (or You!) that they did not pay their fees.

13) Therapist Name & Credentials (New Field). Type your name, your degree and license.

Example: Catherine Scholz, M.Ed., LPC