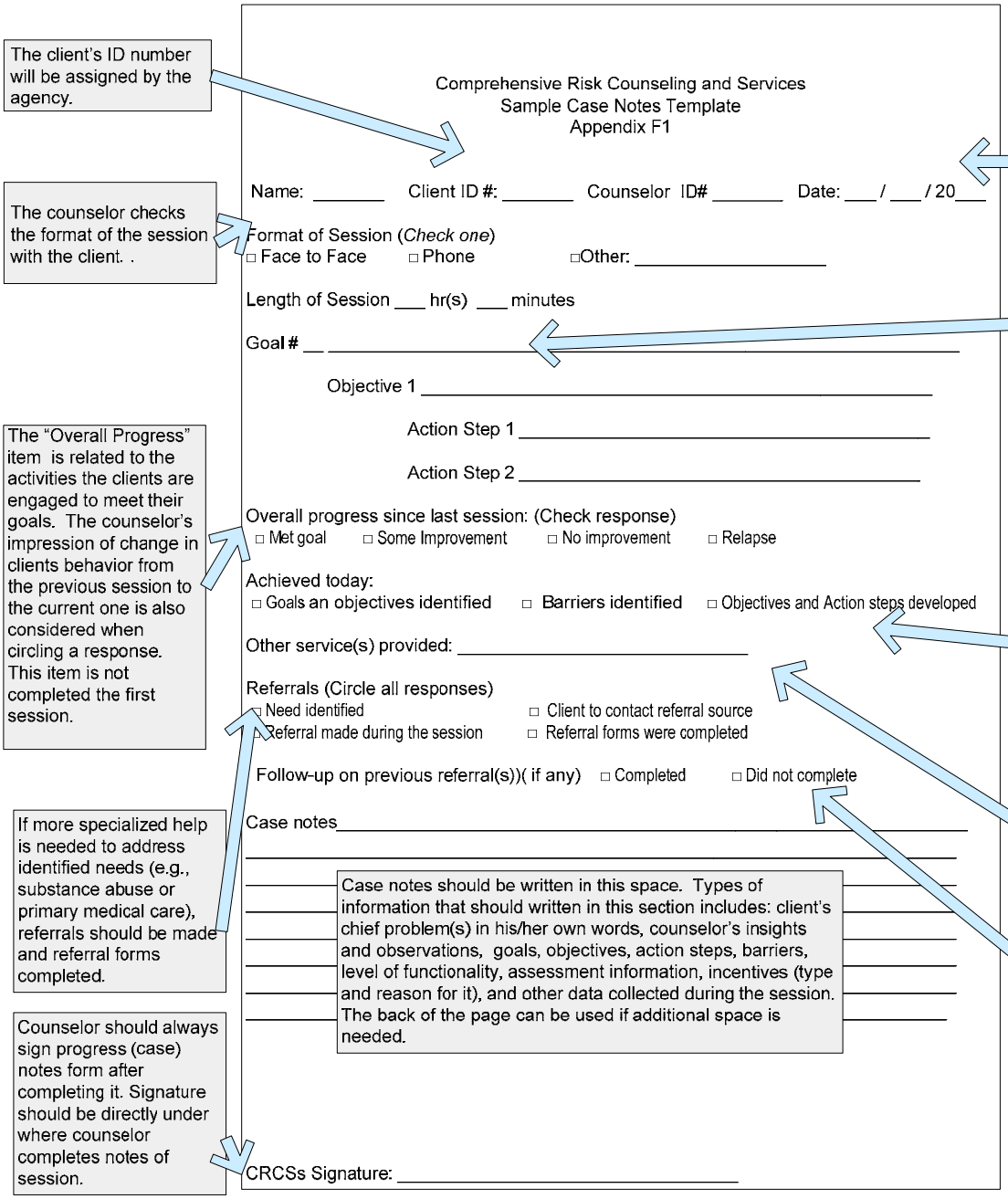
Instructions for Sample Case Notes Template
Appendix F2

This form can be used to record all interactions with clients, but particularly during visits when the client's risk-reduction goals are first identified, as well as during any follow-up visits in which goals are discussed. Depending on the client's needs, counselors should help the client focus on no more than three goals at a time.



The client's ID number will be assigned by the agency.

The session date is the actual date of the counseling session.

The counselor checks the format of the session with the client. .

The goal number and description, along with objectives and action steps, are copied from the prevention plan. There can be more than one objective for each goal. Objectives and action steps may be modified from session to session This information should be completed after each session for each goal addressed.

The "Overall Progress" item is related to the activities the clients are engaged to meet their goals. The counselor's impression of change in clients behavior from the previous session to the current one is also considered when circling a response. This item is not completed the first session.

The " Achieved Today" item is related to the the development, review, and modification of the Prevention Plan.

A list of other services or information not listed on form should be written here.

If more specialized help is needed to address identified needs (e.g., substance abuse or primary medical care), referrals should be made and referral forms completed.

Case notes should be written in this space. Types of information that should written in this section includes: client's chief problem(s) in his/her own words, counselor's insights and observations, goals, objectives, action steps, barriers, level of functionality, assessment information, incentives (type and reason for it), and other data collected during the session. The back of the page can be used if additional space is needed.

Counselor should inquire about completion of any referrals given at any session (if appropriate).

Counselor should always sign progress (case) notes form after completing it. Signature should be directly under where counselor completes notes of session.