



COUNSELLING NOTES

Some counsellors worry unnecessarily about what to include in clinical notes and how to present them coherently.

Why do we need notes?

- They are an aid to memory (*especially useful if you have a large client load or a complex client*).
- They are useful in client reviews (*they give both the client and the counsellor an insight into what has changed and what issues the client wants to work on*).
- Some employers ask you to take notes.
- They provide a chain of evidence should a complaint be made.
- Some insurance companies insist you take notes.
- Some ethical bodies ask you to keep notes.

The best way to think about note-taking is to remember that notes should:

- Be factual and not include the counsellor's opinion on the client or their presenting issue.
- Accurately reflect the client's narrative (*their story*) and any feelings the client expressed.
- Reflect any actions taken by the counsellor, such as speaking to an outside agency (*in the case of a referral*) and contact you may have with the client outside the sessions (*such as a conversation regarding altering an appointment time*)

- Include any agreed actions by the client (*therapies such as C.B.T. or integrative approaches may ask the client to undertake a homework task*). In Person-Centred Therapy, this could include a decision the client has made.

It's also worth considering that clients can request your notes, so having them presented in a coherent and easy-to-read format is essential.

Format

There is no definitive format for note-taking. However, <https://www.basic-counseling-skills.com/> quote the term **S.A.P.O.** as an acronym and format for structuring notes:

Subjective – What is the client's narrative or description of what is happening to them

Assessment – Consider what support or interventions may be needed to support the client. This could also include reviews.

Plan – What is the agreed action the client and yourself have decided to undertake or change?

Other – Any other discussions, such as referrals or conversations with other professionals.

Example

Below is an example of SAPO-structured notes. (*A code number is used to add an extra layer of security. The client's name, address and contact are stored separately*).

Date 9/03/16 **Time** 1 Hr **Session Number** 6 **Client code** number 303

Subjective

The client identified that she feels a loss at not having a family structure and close relatives and to this end gets involved in her charity work. She is planning for a future change in career and states she feels a little happier in her work now she is aware of the options open to her. Client stated that "I realise that my family won't change; it is I who have to accept this and make my way in life."

Assessment

Client discussed using some of next week's session to explore endings in therapy, how she may feel about 'going it alone'.

Plan

This week we had a planned review of where the client feels she is. She identified that she might join a women's group as a way of making friends.

Other

The client has asked me to write to her employer, confirming that she is attending counselling sessions. Her employers are funding the therapy. The client has signed a confidentiality waiver allowing to contact her employer.

Forms of Notes

One question that gets asked is 'Are there different forms of notes?'

The answer to this question is yes. Some therapists from the Person-Centred tradition keep what is sometimes referred to as **process notes**.

Process notes are counsellors' personal account of their process in terms of the counsellor-client relationship and they are kept in a journal format, like the example below.

Any comments made by the client about the process, counsellor's observations and speculations about the process

"I realise that my family won't change. It is I who have to accept this and make my way in life". It feels like the client is finding her autonomy and beginning to come to terms with the lack of family structure which was her presenting issue. I wonder if she is using work to mask the pain of not having a stable family structure.

Issues for counselling supervision

Is this client ready for an ending? What is it in me that feels like this is the case?

Food for thought

In the UK, if a court or the coroner's office requests your client notes, you may have to submit your process notes.

References

Basic Counseling Skills. (2019). *Note Taking*. [online] Available at: <https://www.basic-counseling-skills.com/note-taking.html> [Accessed 30 Dec. 2019].