

Name: _____ **SSN:** _____ **Date:** _____
Type: individual/family/family without/couple/marital/group/intake/consultation/collateral consult/phone call
Units: 4/6/8 **Total Sessions:** _____ **Sessions Used:** _____ **Of:** _____ **Renew Date:** _____
Present: early/on time/late _____ **Who:** client only _____

1. REPORTED > **Meds:** no changes/none _____
Changes: no changes/address/phone/finances/insurance _____
Diet: 1-2-3-4-5 **Sleep:** 1-2-3-4-5 **Exercise:** 1-2-3-4-5 _____
Drugs: illegal(y)(n)alcohol(y)(n)nicotine(y)(n)caffeine(y)(n) _____
Support Groups: AA/NA/Al-Anon/OA/EA/SLAA/PU/Community Alliance/none _____
Support System: sharing with/treated self _____
Symptoms: anxiety/shame/guilt/depression/avoid/escape/pride/anger/aggression _____
Complaints: home/social/work/school _____
Problems: finances/relationships _____
Practiced: what's helping _____
Future Topics/Issues: _____
Topics for Today: _____

2. OBSERVED > **Dress:** (attire/grooming) formal/work/casual/neat/fair/marginal/dirty/body odor/unshaven/uncombed _____
Activity: agitated/odd behavior/unremarkable [mild/moderate/severe] _____ **Habit Deterioration:** a lot/some/none _____
Eye Contact: poor/below-average/average/above-average/staring _____ [variable/decreased/increased] **Ease:** at ease/uneasy _____
Mannerisms: retarded/accelerated/nervous movements/unremarkable/TD/hand wringing or rubbing/leg bounce/foot or finger tapping _____
Cooperation: cooperative/became cooperative/anxious/resistant/uncooperative/oppositional/defiant _____
Engagement: excited/interested/uninterested/preoccupied/bored/open/hesitant/vague/evasive/defensive/faking _____
Speech: integrated/goal directed/sequential/circular/digressive/rambling/disconnected/fragmented/confused _____
Mood: dysphoric (depressed/anxious/irritable) apathetic/elevated/euphoric/expansive/euthymic [mild/moderate/severe] _____
Affect: broad/restricted/blunt/flat/inappropriate/labile/tearful/impaired/too congruent [mild/moderate/severe] _____

3. INTERVENTION > 2 healthy options, 3 Rs, 4 signals, 5 opposites, 5 Thinking Positions, ABCs, acceptance, addiction, assertiveness, attitude coping, chair work, communication, coping statements, counters, cycle-of-s, defenses, demands, detachment, emotional responsibility, emotional skills, empathy, encouragement, Existential, family issues, GADSAP, garden mind, homework, identity, IRR, journal review, *Let's Get Rational*, LFT, mental-court, M-M, motivation, multi-valued thinking, parenting, RMR, school, problem-solving, relapse prevention, role-play, roles vs. self, script work, self-acceptance vs. self-esteem, self-care, social skills, spiritual, support, survival alarms, systems, TA, thinking skills, thought-things, UAE, ULE, UOE, USE, ventilation let-go, work.
Help Explored: _____
Effectiveness Intervention: (technique/strategy) none/mild/average/a lot/exceptional/increasing _____
Effectiveness Counselor: none/mild/average/a lot/dramatic/increasing/building rapport _____

4. RESPONSE > **Gave:** handout/schedule/flyer _____
Reported Gains: none/relief/support/help/insight/motivation/skills (thinking/feeling/behaving) _____
Client Summary: learn/aware _____
Client Outcomes: apply/practice _____
Final Questions: none _____
What Helped: _____
What to Repeat: _____
What to Add: _____
Remember For: _____

5. HOMEWORK > **Old:** done/not done _____
New: do old _____

6. ANALYSIS > **Client Direction:** sabotage/coalition/protection/permission/potency/relationship/insight/switch
Symptom Intention: deny/forget/substitute/maintain/victim role/blame/justify/relieve/recognize/remove/replace
TP Progress: reported gaining help with _____
Demonstrated: resistive/defensive/cooperation/openness/interest/risk taking/switched focus to self/faced ugliness
Progress Needs: payoff or pride removal/motivation/insight/cognitive skills/emotional skills/behavioral skills/HFT

7. PLAN > **TP:** new/modify/reinforce/focus on _____
Contracts: review/none _____
Consultation: releases/referral/follow-up/phone/research/none _____