



exclusively for iPad

## Progress Note / Chart Note Template

For use with the Insight Notes notetaking/recordkeeping system. Please remember to review this template to ensure that it meets the needs of your patient population. Remember that Insight Notes will automatically include the date and name of your patient/client. Once you select to Complete your note, your name, signature, and license information (if applicable) will automatically be included.

Suggested items to include (feel free to add your own, too):

- A. Time / Length of session
- B. Diagnoses and medications (especially changes from previous appointments)
- C. Themes addressed: (explain how these themes were addressed in-session)

Primary support group problems	Self-Care problems	Social environment problems
Economic stressors	physical health problems	current/past victimization
Work/School problems	Housing problems	Other

- D. Functional improvement or decline?
- E. Treatment plan implementation/adjustments: (interventions provided, and their relationship to the treatment plan, homework, etc.)
- F. Risk issues addressed and assessed (if any): should the treatment plan be revised?
- G. Informed consent issues/concerns
- H. Boundary issues/concerns