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**Case Notes Instructions & Checks**

**SOAP Note Tasks**

* **Subjective:**
  + Does the note capture the client's own words, feelings, or perspective?
  + Is the client's chief complaint or reason for the session clearly stated?
  + Are all direct quotes placed in quotation marks?
* **Objective:**
  + Does the note include observable facts and behaviors (e.g., appearance, affect, behavior)?
  + Are all observations free of personal opinion or interpretation?
  + Is any measurable data (e.g., test scores, attendance) included?
* **Assessment:**
  + Is your professional interpretation of the S and O data clearly stated?
  + Does the assessment link the client's current state to their overall treatment goals?
  + Is the note free of jargon and easily understandable to another professional?
* **Plan:**
  + Does the plan outline specific, actionable steps for both you and the client?
  + Is a clear follow-up action or date noted?
  + Does the plan align with the client's treatment goals?

**DAP Note Tasks**

* **Data:**
  + Does this section combine both the subjective information (client's report) and objective observations?
  + Is all information factual and free of bias?
  + Are direct quotes from the client included where appropriate?
* **Assessment:**
  + Does the assessment provide a professional analysis of the data presented above?
  + Does it connect the data to the client's overall treatment plan?
  + Is the assessment concise and focused?
* **Plan:**
  + Is the plan clear and easy to understand?
  + Are the next steps for the client and the professional clearly defined?
  + Does the plan show a logical progression from the assessment?

**BIRP Note Tasks**

* **Behavior:**
  + Does the note describe the client's key behaviors during the session?
  + Are these behaviors linked to the client's presenting problems or goals?
  + Is the behavior described in a factual and non-judgmental way?
* **Intervention:**
  + Is the specific intervention or technique you used clearly documented?
  + Does the note explain the purpose of your intervention?
  + Is it clear how the intervention relates to the client's goals?
* **Response:**
  + Does the note describe the client's response to your intervention?
  + Was the response positive, negative, or neutral?
  + Did the client make any progress toward their goal as a result of the intervention?
* **Plan:**
  + Is the plan for the next session or for the client's take-home work clearly outlined?
  + Does the plan build on the progress or challenges identified in the Behavior and Response sections?
  + Does the plan align with the client's long-term treatment goals?

**GIRP Note Tasks**

* **Goal:**
  + Is a specific, measurable goal for the session or a larger treatment goal clearly stated?
  + Is the goal client-centered and relevant to their treatment plan?
* **Intervention:**
  + Does the note detail the specific action or technique you used to help the client work toward their goal?
  + Is it clear how the intervention directly targeted the stated goal?
* **Response:**
  + Does the note describe the client's reaction and progress toward the goal as a result of the intervention?
  + Is the client's response documented with factual evidence?
* **Plan:**
  + Is the next step for continued progress clearly defined?
  + Does the plan set a clear path for the client's next session or week?
  + Does the plan demonstrate a logical follow-up to the client's response?

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