



[Get Your Free Case Management Software](#)

(Free Trial. No Credit Card Needed)

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?

View our website for more helpful guides:

<https://www.socialworkportal.com/>
