*Psyc*Prac Session Notes

Session notes need to be organised, accessible, brief and process-oriented. These days the requirement on any psychologist is to account for the process. In other words, *what are you doing and why are you doing it*? Even if you don't agree with this, the focus these days is 1) assessment, 2) diagnosis, and 3) the treatment plan.

If you do any insurance work then at some stage you will be subpoenaed for your notes. In other words, if you do treatments that are paid for by a third-party say for workers compensation or CTP (Compulsory Third Party), then there is a strong change that your notes will be subpoenaed at some time. Your notes could be subpoenaed up to seven years after your client's last session. If your clients are in the *Psyc*Prac system then their records will be easily found. And if the session notes need a bit of a tidy-up, then *Psyc*Prac gives you that opportunity before you commit them to paper and send them off.

Session notes consist of four areas of interest…

1. Homework Completed: A brief description of what the client did for the homework. In other words, was it completed? Did the client engage in the homework as it was set? Or does the client make excuses about not completing it?
2. Homework Set: Out line what you have asked your client to do for homework for the next session. Describe the task, or list the tasks.
3. Topic for This Session: What did you do in this session? What did you cover? What actually happened? Did this session make incremental gains on the last session, or is this client inclined to vent and block progress? Were you able to keep on track?
4. General Notes: This applies to your general observations. There might be external factors that intervene or intrude into the treatment. Often there are peripheral matters that do have some baring on the progress or that inhibit progress.

Creating Session Notes

There are a two ways to begin the process of creating Session Notes, 1) from within the Diary page, and 2) from the Menu strip down the left side of the screen.

Create Session Notes from within the Dairy Page…

1. Double-click the Diary item on the Dairy Page.
2. Click the Session Notes button.
3. The Create a Session Notes Page then opens. The Referral and Client will already be displayed.
4. Check that the Session Date is the correct date for the notes.
5. Click the Create Session button.
6. You are then taken to the Sessions Notes page.
7. Under the Session Date, enter the Description for this session, eg., Session one, Session two, etc. Or Case Conference with GP, or Discussion with Insurer Re: Approval.
8. Then complete the four sections for notes as they apply.
9. Save as you go. Do not exit the window without saving. If the Save icon in the menu bar at the top of the screen is black (not grey) then you need to save.

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Create Session Notes from the Menu Strip…

1. Click on Create Session Notes Page in the Menu strip down the left side of the screen.
2. In the Find Referral panel, use the Lookup List to find the Referral to which the notes apply. The Client's details will display in the Client Details panel.
3. Select the correct Session Date.
4. Click the Create Session button.
5. You are then taken to the Sessions Notes page.
6. Under the Session Date, enter the Description for t his session, eg., Session one, Session two, etc. Or Case Conference with GP, or Discussion with Insurer Re: Approval.
7. Then complete the four sections for notes as they apply.
8. Save as you go. Do not exit the window without saving. If the Save icon in the menu bar at the top of the screen is black (not grey) then you need to save.

Editing Session Notes

Editing notes means that the notes already exist. You must find the notes, change something and then save.

The Steps for Editing Notes…

1. On the menu strip down the left of the screen, click the Edit Session Notes Page button.
2. You are taken directly to the Session Notes Page.
3. In the Find Referral panel, use the Lookup List to find the Referral to which the notes apply. The Client's details will display in the Client Details panel.
4. Use the Lookup List to find the Session Notes by clicking Lookup List icon in the Session Date field. Double-click the Session Notes line in the Lookup List.
5. The notes will display. Make changes as required.
6. Save the notes if the Save icon in the top menu bar is black (not grey). All ways save. Do not exit the page without saving.

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