

# SAMPLE NOTE TAKING DOCUMENT FOR CLIENT SESSIONS.

*All links have been removed.*

- \* Appointment ID: XXX\_XX
- \* Scheduled Start Time:
- \* Actual Start Time:
- \* End Time:

## Preconsult Notes:

*Notes from chart, consult plan*

## Participation in Research:

! Consent Form (version as of Spring '22)

Questions about research participation:

- \* Consent to Research (Y/N):
- \* Consent to Notes (Y/N):
- \* Consent to Recording (Y/N):

**! Turn on recording if yes !**

## Consult Notes:

Tech Safety Checklist, Tech Assessment, CETA Guides, Case Lead Guide

\* Client background and concerns:

...

\* Actions Taken:

...

## Wrap Up:

\* Appointment Tracker, \*Case Tracker, Common PCCs

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- \* Appointment End Time:
- \* PCC or Follow Up Appointment Needed?
- \* Permission to share info with caseworker?

**! Upload/delete any recording !**

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