OPTUM

NOTES MUST BE LEGIBLE TO BE LEGAL

Client File No.

PROGRESS NOTES

Each entry must include:
- session number and type or contact type
- date and time of session/contact
- session attendee initials
- focus of the session/contact
- brief clinical impressions
- plan and/or homework
- discharge and follow-up information, as appropriate

At the end of each entry:
- signature & credentials
- date of writing

Type of session/contact :
in person – IP
telephone (client) – TC
telephone professional consultation – TP
telephone (workplace) - TW
clinical supervision – CS
referral resource consultation – RC
referral or client follow up – F/U
other (specify) - O

DATE/TIME	SESSION/CONTACT	SESSION ATTENDEE INITIALS	
	Session No.:		
	Session or Contact Type:		

ISSUES/THEMES ADDRESSED

Focus of session/contact:

Brief clinical impressions:

Plan and/or homework:

Signature & credentials: Date:

DATE/TIME	SESSION/CONTACT	SESSION ATTENDEE INITIALS	
	Session No.:		
	Session or Contact Type:		

ISSUES/THEMES ADDRESSED

Focus of session/contact:

Brief clinical impressions:

Plan and/or homework:

Signature & credentials: Date: