



# SAMPLE CLINICAL DOCUMENTATION

## Progress Note - Family

### Case Snapshot

**Primary Client:** Mom

**Family Members Present:** Step-Dad, Daughter (E), Daughter (A)

**Presenting Problem / Chief Complaint:** Mom reports ongoing moderate-to-severe anxiety, including rumination, excessive worry, shakiness, heart racing, and fears disproportionate to stressors. Anxiety is interfering with parenting communication and contributing to tension and distress among family members. Family reports feeling “always fighting” and disconnected.

**Context:** Symptoms are impacting social and relational functioning within the family, leading to communication difficulties, relational tension, and observable anxiety in children.

### Info

<b>Present at Session</b>	<i>Client, step-dad, daughter E, daughter A</i>
<b>Service Provided</b>	<i>Family Therapy</i>
<b>Location of Service</b>	<i>Telehealth</i>
<b>The client agreed for this visit to occur via telehealth. The client's full name and address of present location has been confirmed at the start of the session:</b>	<input checked="" type="checkbox"/> <i>Yes – client at home</i> <input type="checkbox"/> <i>Yes – client in another location, which has been confirmed</i> <input type="checkbox"/> <i>No</i>
<b>Client is appropriate for telehealth</b>	<i>Yes</i>
<b>Is the client presenting any risk factors that indicate further risk assessment is needed?</b>	<i>No</i>

### Measures

<b>Baseline Scores (at intake)</b>	<ul style="list-style-type: none"> <li>● <i>GAD-7: 16 (severe anxiety)</i></li> <li>● <i>PHQ-9: 11 (moderate depression - secondary to anxiety/family stress)</i></li> </ul>
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<b>Current Scores (this session)</b>	<ul style="list-style-type: none"> <li>● <i>GAD-7: 14 (moderate-severe anxiety - showing improvement)</i></li> <li>● <i>PHQ-9: 9 (mild-moderate depression - showing improvement)</i></li> </ul>
<b>Dropdown / How measures were used in-session:</b>	<ul style="list-style-type: none"> <li>● <i>Reviewed scores with the client</i></li> <li>● <i>Drew clinical insights from the data</i></li> <li>● <i>Made treatment adjustments based on measure results</i></li> <li>● <i>Discussed client's perception of progress and scores</i></li> </ul>
<b>Additional detail on in-session use of measures:</b>	<p><i>GAD-7 scores were reviewed with the primary client, highlighting moderate-to-severe anxiety levels. Clinical insights from the measure guided the session to focus on communication patterns that exacerbate anxiety and relational conflict. Adjusted interventions by emphasizing mindfulness and Imago Dialogue exercises to improve emotional awareness and reduce relational tension. Family members discussed how scores relate to daily interactions and agreed to implement communication skills between sessions.</i></p>

## Symptoms

<b>Current Symptoms</b>	<i>Rumination, excessive worry, thoughts of dread, shakiness, heart racing</i>
<b>Area(s) of functional impairment</b>	<i>Social/Relational</i>
<b>How are symptoms specifically impacting clients functioning in this area?</b>	<i>Anxiety interferes with couple communication regarding parenting. Family members report disconnection and frequent conflict, contributing to stress in children.</i>
<b>Focus of session/session summary</b>	<p><i>Session centered on improving family communication and emotional awareness related to the primary client's moderate-to-severe anxiety. Therapist facilitated mindfulness exercises to enhance active listening, empathy, and regulation during moments of family tension. All members participated appropriately; parents noted increased ability to stay present, and children expressed positive engagement with the exercises. Discussion linked anxiety symptoms to communication challenges, supporting insight and collaborative skill-building. Progress evident in openness and participation, with continued focus needed on consistent use of communication and mindfulness tools at home. No safety concerns reported or observed.</i></p>

## Treatment

<b>Treatment approaches used for this session</b> (ie CBT, DBT, EMDR. etc)	<i>Imago Relationship Therapy (IRT), Mindfulness, Emotionally Focused Therapy (EFT)</i>
<b>Specific Interventions</b>	<i>Led Imago Dialogue exercise, taught emotional identification, practiced active listening and mindfulness as a family unit.</i>
<b>Clients response to interventions</b>	<i>Family members actively participated; children reported the exercises were "kind of fun," parents found exercises helped them be more present.</i>
<b>Plan/homework for next session</b>	<i>Practice daily Imago communication exercises, focusing on active listening. Each family member will reflect on the exercise and share insights in the next session. Continue mindfulness practices to support emotional regulation.</i>
<b>Progress towards treatment goals</b>	<input type="checkbox"/> No change since last visit <input checked="" type="checkbox"/> Some progress apparent <input type="checkbox"/> Significant Progress <input type="checkbox"/> Maintaining/stable <input type="checkbox"/> Some regression of progress <input type="checkbox"/> Significant regression of progress

## Diagnosis

<b>Diagnosis</b> <i>For couples/family, the diagnosis given should be for the primary client.</i>	<i>F41.1 Generalized Anxiety Disorder</i>
<b>Date of Service</b>	<i>6/21/2024</i>
<b>Session Start Time</b>	<i>5:00pm</i>
<b>Session End Time</b>	<i>6:01pm</i>
<b>Session Length / CPT</b>	<input checked="" type="checkbox"/> 90847 - Couples/Family therapy with the patient 26+ min

**\*\*Be sure to review treatment plan if necessary before signing and submitting the note\*\***

## Signature

<b>Provider Name</b>	<i>Jane Example</i>
<b>Date</b>	<i>6/22/2024</i>

<b>Time</b>	<i>8:00am</i>
<b>License Type</b>	<i>LCSW</i>