

Appendix A

Include who was involved in the contact and detail any new or significant information obtained. Finally, state what occurred during the session, what was accomplished, plans for follow-up, homework assigned, and obstacles to treatment goals. Note any out-of-the-ordinary occurrences during your contact with a client.

Outline for Sample Case Note/Progress Note:

This is an example of an outline for writing a case note. There are many formats, but all case notes have requirements such as the name of the client, reason for the contact and signatures.

Name of client:

Date:

Reason for contact:

Type of contact (face-to-face, telephone contact, or collateral contact):

Major facts noted during the contact:

Other pertinent information:

Current status, including appearance, cognition, emotional state, orientation to time and place:

Progress toward achieving goals:

Summary/conclusion/future plans:

Social Worker's Signature:

Outline for SMART Goals

When writing goals with clients, consider using the template for S.M.A.R.T. Goals. This format for writing goals is a shorthanded way of documenting the work to be done by the client. This outline is easy to follow. Again, each agency will have their own way of documenting the client's progress in attaining his or her goals.

S. = Specific—simply written and clearly defined. Be specific about what is to be accomplished.

M. = Measurable—how will you determine if the goal is reached? What is the tangible evidence that the client has accomplished the goal?

A. = Attainable—is this goal achievable and reasonable, and can it be accomplished. It is important to determine the client's skills and knowledge or abilities to reach the goal.

R. = Realistic—is the goal relevant, and does the client see it as worthy of attention?

T. = Timing—what is the time frame for reaching the goal? What are the deadlines to reach the goal?

Source: Compiled from Kagel and Koppels (2008), Reamer (2013), and Sheafor et al. (2011).