Session Notes Summary Sheet Instructions

During the Implementation phase, your agency may find it important to summarize non-clinical client information and track a client’s overall progress. This Session Notes Summary Sheet is a condensed summary of the all notes recorded on the individual Session Notes forms (Remember: one Session Notes form should be completed per client session).

The information requested in the sheet on the next page can be found in the individual session notes and recorded here. This information can be summarized for the monitoring and evaluation plan (process monitoring) and/or to help to you track clients' progress. The Summary Sheet should be completed after the last client session.

Please use the same codes for the Session Notes Summary Sheet as those listed in the instructions for the Session Notes form.

Did the client link to medical care? This question captures information about whether or not a client followed through with the referral to medical care. You may have this information directly because you accompanied the client to the medical appointment. If you did not attend the medical appointment with the client, all efforts should be made to follow up with the client (even if it occurs after the last session). Therefore, this question should be completed based on your personal knowledge, a later personal contact with the client, or from a telephone call from the client or clinic.

Code Listings for the Session Notes Summary form: The code listings for the referrals section of the Session Notes Summary are the same as those suggested codes used on the Session Notes form. These numerical codes will simplify the data entry and data analysis processes, and will allow your agency to input uniform numerical codes rather than words for each field.