


# *Taking the Stress Out of Documentation*


Aimee Isenberg, PhD, LPC/MHSP-S  
Lisa Long, LPC/MHSP





*Information from this Presentation  
is Primarily Taken from*

Stress-Free Documentation for Mental Health  
Therapists by Maelisa McCaffrey



*What Feels  
Most Stressful  
about  
Documentation  
for You?*



# Quiz

15 items

True/False

No right or wrong answer

Goal: Where are you currently with documentation practices?

What are potential areas of improvement

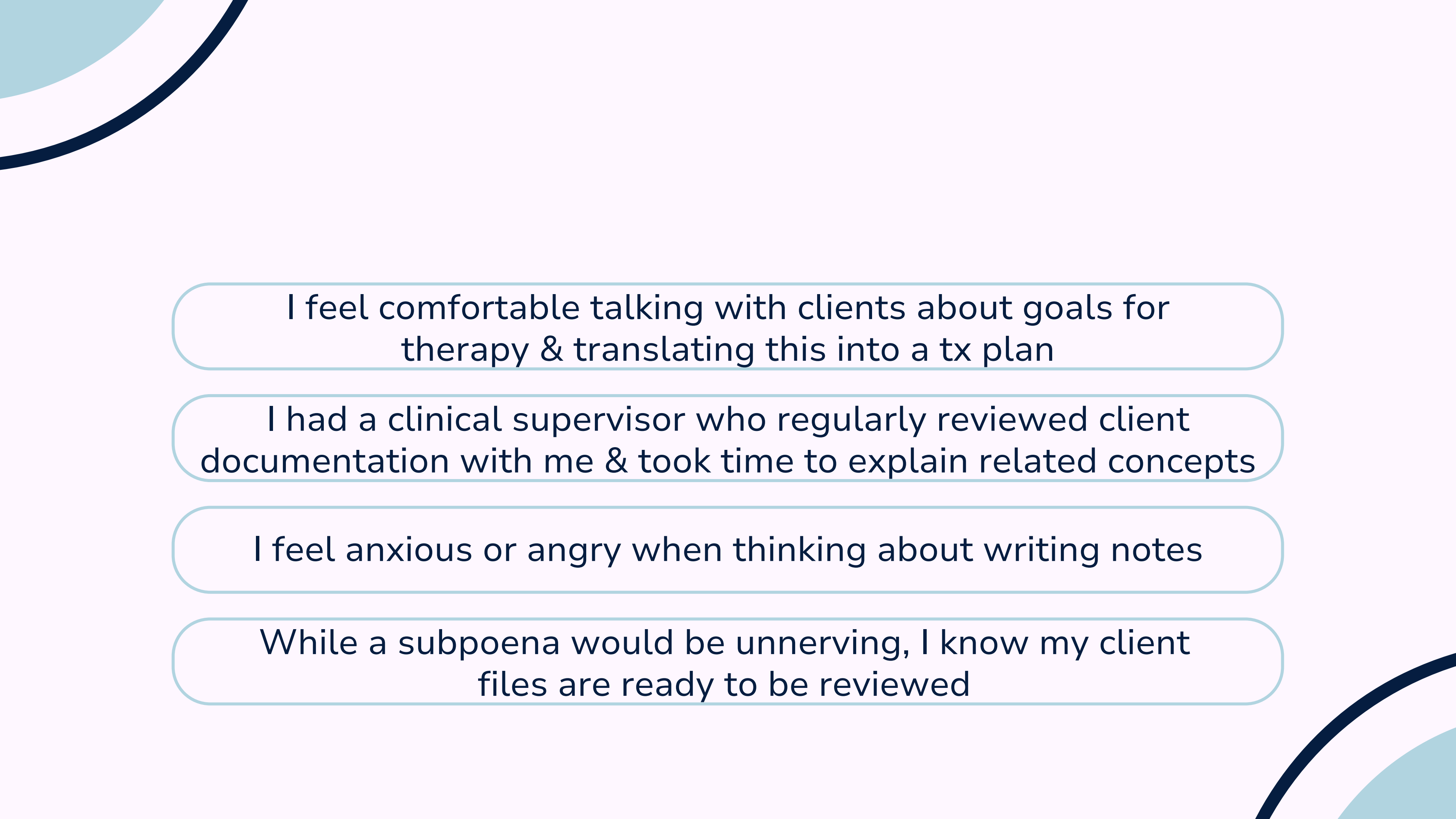
# True or False?

I know what time of day is best for me to reflect & be quiet

When I sit down to write progress notes, I have no idea what to say

My clients are often frustrated with having to fill out so much paperwork at the outset of therapy

I know how to calm my mind when my thoughts are racing



I feel comfortable talking with clients about goals for therapy & translating this into a tx plan

I had a clinical supervisor who regularly reviewed client documentation with me & took time to explain related concepts

I feel anxious or angry when thinking about writing notes

While a subpoena would be unnerving, I know my client files are ready to be reviewed



I would have difficulty putting into words what “progress” looks like for my clients

I know my intake forms inside & out and can easily answer questions on practice policies

I have cried about or lost sleep over documentation within the last year

I have a clear process for saving client documentation & feel confident it is securely stored

# *Last one...*

I understand what to include in documentation for medical necessity criteria

If a client asked to see their records, I would feel uncomfortable letting them read progress notes

I know how long it takes me to write progress notes



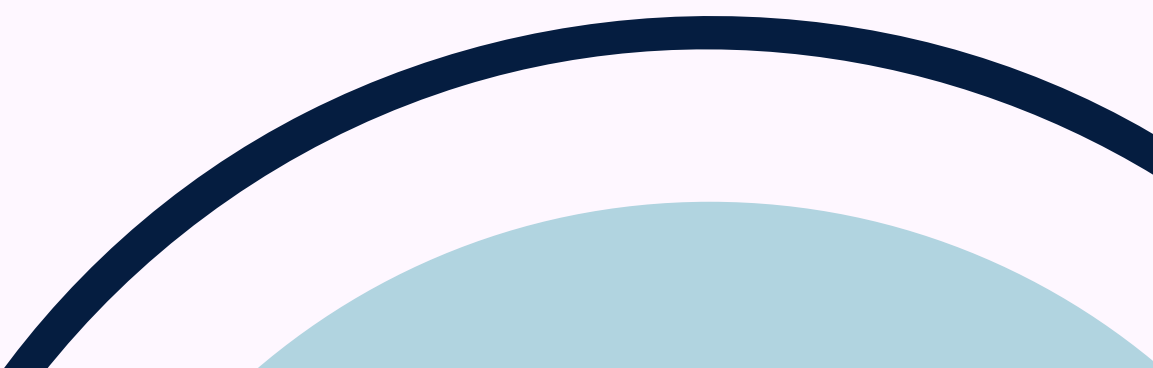


# *Reflection*

Was there a question that triggered you emotionally?  
Fear, guilt, resentment?

Was there an area where you felt confident?

Can you make 1-2 goals for yourself?



# *Reminders*

**Ethics Not  
Rules**

**Clinical  
Setting &  
Location**



# *Progress Notes & Common Concerns*

# *I Don't Have the Time!*

Between Clients

End of Day

Beginning of Day

Time Blocks

Admin Days

# *I Am SO Burned Out!*

Pause

Shake It Out!

Breathe

Gratitude

Relieve the Pressure

# *I Am SO Behind!*

Current Notes

Time Yourself

Adjust Schedule

Know the #s

Self-Compassion



# *Collaborative Documentation*

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The process of including your client in documentation

De-mystifies documentation for clients

Clients usually enjoy the process

Helps to save time, build alliance with client, and share decision-making with client



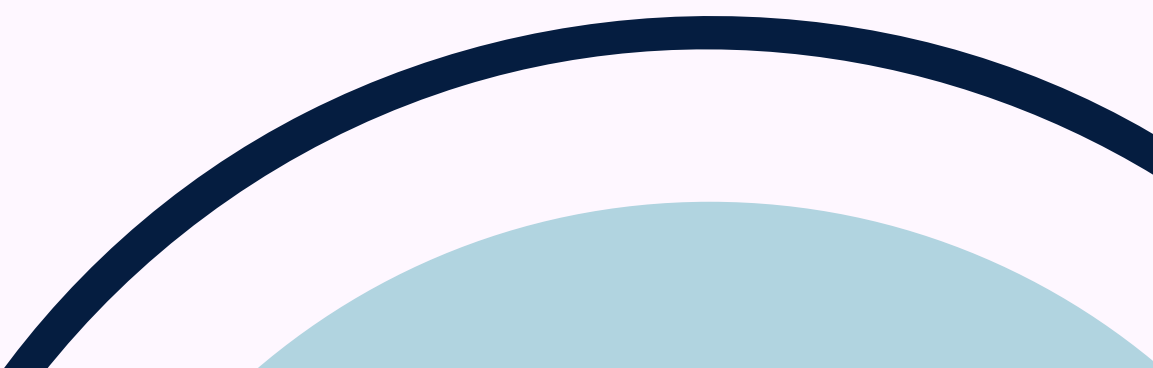


# *Collaborative Options*

Minimal  
Involvement

Partially  
Collaborative

Fully  
Collaborative



# *Incorporation*

- When first introducing: You know that I write notes about our sessions, and today I would like to try something new by writing it together. It may feel weird at first, but I am really interested in getting your feedback.
- At the end of sessions: I'd like to get your feedback on the session today.
  - Let's stop here and review what we have talked about.
  - What do you think is most important for me to note from the session today?
  - Today we talked about \_\_\_\_\_ and we did \_\_\_\_\_ exercise. We came up with some ideas on how to deal with \_\_\_\_\_. (Chow, 2018, p. 150)



*What  
About AI?*

# *How It Works*

Data Input

AI Interpretation

AI Output

Clinician Review

Enter into Record

# *AI Ethics*

**Still in  
creation for  
most  
professions**

**ACA (2023)  
recommends  
clinicians  
obtain consent  
before use.**

# *Considerations*

- HIPAA complaint platforms? BAA?
- Using to help with time management but not as a crutch for note-insecurity
- Reviewed with client? And documented that review?
- Reviewing all AI documentation and editing if needed?
- Tracking time to make sure it really is more efficient?



*Final  
Thoughts or  
Questions?*



*Thank  
You*





# References

Chow, D. (2018). *The first kiss: Undoing the intake model and igniting the first session in psychotherapy*. Correlate Press.

McCaffrey, M. (2023) *Stress-free documentation for mental health therapists*. QA Prep.