



Taking the Stress Out of Documentation

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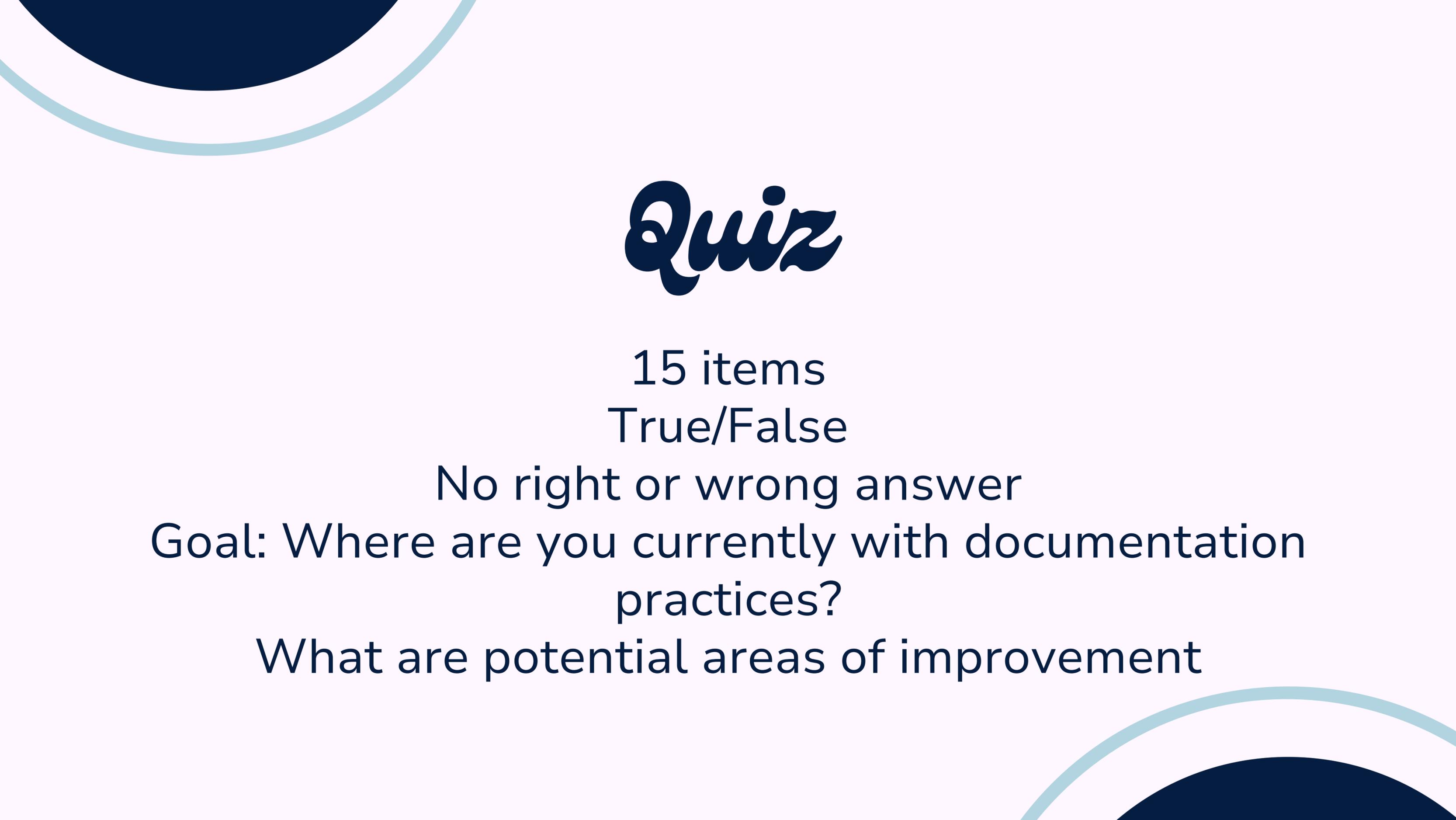
*Information from this Presentation
is Primarily Taken from*

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

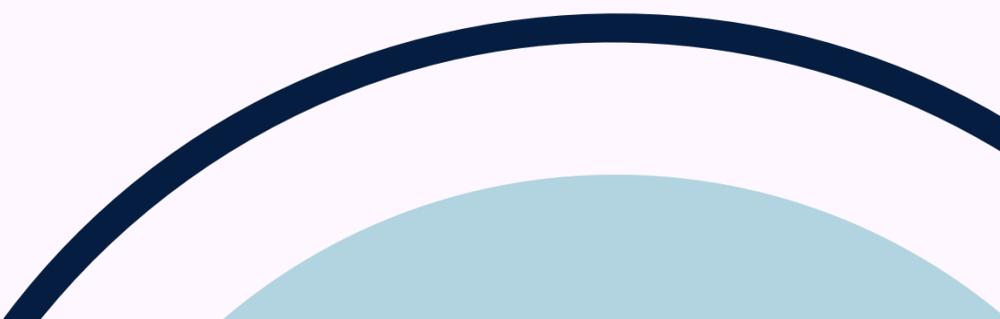


Collaborative Options

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 compliant 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.

