**CLINICAL SESSION OR PHONE COACHING NOTE**

*Note: Complete all sections for a clinical session; complete only relevant sections for phone coaching.*

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| Client name: |       | Location: | Videoconf. | Phone |
| Session date: |       |       |       |
| Session time: |       | Student therapist: |       |
| Session #: |       |

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| **Life-Threatening Concerns** |
|  | No | Yes |
| Increase in other- or self-directed violent thoughts or behaviors? |       |       |
|  | N/A | No | Yes |
| Formal risk assessment and management procedures |       |       |       |
| **Client Functional Ratings** |
|  | Worsened | Typical  | Improved |
| Freedom-interfering behaviors (criminogenic needs) |       |       |       |
| Quality of life (non-criminogenic needs) |       |       |       |
| Skills utilization (since last session) |       |       |       |
| **Therapy-Interfering Concerns** |
|  | No | Yes |
| Client on time |       |       |
| Technology problems |       |       |
| Other therapy interfering behavior/responsivity issues (e.g., missed appointment(s), client not in private location, diary card refusal, no skills practice, did not use phone coaching when warranted, behaviors that violate therapist’s limits) |       |       |
| Narrative comments:      |

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| **Strategies Used in Session/Phone Coaching** |
| Phone coaching |       |
| Mindfulness exercise |       |
| Homework review/coaching |       |
| Skills training |       |
| Orientation/Behavior analysis/Mindfulness/Dialectics | Distress tolerance | Interpersonal effectiveness | Emotional regulation |
|       |       |       |       |
| Dialectics (acceptance/change, irreverent/reciprocal, flexible/centered, demanding/nurturing, consultation to client/consultation to environment) |       |
| Commitment |       |
| Validation |       |
| Cheerleading |       |
| Behavioral assessment |       |
| Problem solving (orienting, didactics, insight/interpretation) |       |
| Exposure |       |
| Cognitive modification |       |
| Suicide or violence risk management |       |
| Contingency management |       |
| Observing limits |       |
| Case management |       |
| **Client Progress During Session/Phone Coaching** |
|  | Far below expectations | Below expectations | Meets expectation | Above expectation | Far above expectation |
| Participation |       |       |       |       |       |
| Insight |       |       |       |       |       |
| Overall (responsivity) |       |       |       |       |       |
| **Next Session** |
| Homework assigned:      Plan for next session:       |
| Narrative comments:      |