



Collaborative Documentation Scripts

Introducing Collaborative Documentation

Utilize the Script you believe is most applicable to you and your client.

- **Sample Script 1:**
 - *"We are going to utilize a new note taking strategy during our session today. Instead of taking notes after the session, we will take notes during the session which will allow us to better focus on and help us to be in agreement on what is being expressed. In doing so, I will allow you to read the notes I take to actively participate in the reflection process. Do you have any questions?"*
- **Sample Script 2:**
 - *"Today we will be doing something that might be new to you. I am going to take notes during the session, and then during the last five minutes we will review progress made in the session and those notes I took. Do you have any questions?"*
- **Sample Script (if taking your own personal notes during session)**
 - *Interact normally with the client during session taking notes on pad saying "I'm going to jot down some notes so we'll remember them when we write our note at the end of the session".*
- **Sample Script 3:**
 - *"At our agency we believe the therapy process is a collaboration between the therapist and the client/family. Starting ___ we will be taking the first 5 minutes of the session and the last 5 minutes of the session to review how therapy has been assisting you with _____. By creating the document together, we can ensure that I am understanding what you are needing and how the services are assisting you with your goals."*
- **Your script should include the following items:**
 - The term "concurrent documentation."
 - Explain this term - this is a team effort between client and service provider to create a record that documents the session content and process "at the same time" with the consumer while he or she is still present in the session with you.
 - Frame it more as an "invitation" to their participation in treatment rather than a "requirement."
 - Explain that you will be reviewing the following things as you document:
 - The goals and objectives addressed during the session
 - The therapeutic interventions provided by the direct care staff
 - Their feedback regarding progress made and an indication of their perceived benefit of the service.
 - Enumerate the benefits to their participation in this way
- **NOTE:** Please use positive terms in this script. Do not apologize for the process or say something like "The agency is making me do this." This only serves to undermine the CD process, the therapeutic value of CD, and ultimately the therapeutic relationship.
- Keep a **POSITIVE ATTITUDE** about this change in practice by focusing on the benefits to your clients, yourself and this agency.



Scripts for incorporating Collaborative Documentation in session: Using SOAP with client

- **First 5 min:**

S: How have you been feeling since we last met? (Can use a visual aid if needed).

O: How has your body shown you that you have been feeling _____?

Ask if they have been able to practice a skill taught in the previous session (if applicable). Did it help? Why or why not?

- **Last 5 min:**

- "OK, let sum up what we've discussed/did today"

- "Let's review and write down the important parts of our session today." Or

- "Now let's work together to document the important accomplishments/ideas/work that we have done today."

A: "What did we do today that was helpful".

P: What would you like to work on the next time we meet re: _____?

P: What task/skill will you agree to work on until we meet again?

P: I will agree to ____ for our next session.

We will review what we both agreed upon in the next session.

Sample Script for Introducing Concurrent Documentation for Biopsychosocials:

"During our session today we will be discussing information that will help me best understand the concerns you reported about _____. To ensure I am accurately capturing your thoughts and feelings about _____ we will be completing the document together. Throughout our session I will type in what you have reported to me, and I will review the different sections with you to make sure I am understanding the information correctly."

Sample Script to Introduce Concurrent Documentation for a Treatment Plan:

"Today we will be discussing the goals we would like to focus on in treatment. To ensure I am accurately capturing what you would like for us to work on we will be completing the document together. Throughout our session I will type in what you have reported to me, and I will review the different sections with you to make sure I am understanding the information correctly."

Sample Script for Introducing Concurrent Documentation for Treatment Plan Reviews:

"In today's session we will be reviewing the goals we have been working on in treatment for the last 3 months. I will type in areas you may have concerns in, changes that may have affected your progress, what progress you have made in the goals and how I can continue to assist you in therapy."

