

Individual Psychotherapy Note Template

Clinical note template, individual psychotherapy | Marked-up specimen

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A note template rewritten to ask for the time, the signature block, and the delivery details its own practice guidance already called for.

ORIGINAL, WITH EDITS MARKED

SPECIMEN, PREPARED BY EDITFAST FOR ILLUSTRATION. NOT A REAL RECORD.

Fairmont Behavioral Health Associates (fictitious) - Form PT-7

EXTRACT FROM THE PRACTICE'S DOCUMENTATION GUIDANCE (reproduced unchanged in both panels)

DG-2.1 Every note records the date of service, the start time, the stop time, and the total face-to-face time with the patient in minutes.

DG-2.2 Every note records the patient's name and the medical record number.

DG-2.3 Every note is signed by the person who furnished the service. The signature block carries that person's printed name, credential, and the date signed.

DG-2.4 Every note records whether the service was furnished in person or by telehealth. Where it was furnished by telehealth, the note also records the location of the patient, the location of the practitioner, and the technology used.

DG-2.6 An abbreviation is expanded at its first appearance in the note.

DG-2.9 Retention: notes are held seven years from the date of service.

FORM PT-7 - INDIVIDUAL PSYCHOTHERAPY NOTE

Date: _____¹ Patient: _____ MRN: _____²

Session length: _____³

Modality: _____⁴

Presenting concerns: _____

Interventions: _____

Plan: _____

Provider: _____⁵

WHAT CHANGED, AND WHY

#	Was	Now	Reason
1	Date: _____	Date of service: _____	Two dates belong on the note, the day of the service and the day it was signed. One field labeled Date leaves a reader to guess which one it holds.
2	MRN: _____	Medical record number (MRN): _____	DG-2.2 calls the field the medical record number, and DG-2.6 asks for an abbreviation to be expanded at its first appearance. The first field line of the form carried one unexpanded.
3	Session length: _____	Time (DG-2.1) / Start time: _____ Stop time: _____ / Total face-to-face time with the patient: _____ minutes	One blank line accepts an hour, a range, or the word standard. DG-2.1 names a start time, a stop time, and a total in minutes, and a field for each is what lets a note carry all three.
4	Modality: _____	How the service was furnished (DG-2.4) / In person _____ Telehealth _____ / If telehealth: patient's location _____ practitioner's location _____ technology used _____	DG-2.4 asks first whether the service was furnished in person or by telehealth, and then asks for three further items in the telehealth case. A blank line headed Modality collects none of those four answers reliably, because it does not say which question it is asking.
5	Provider: _____	Signature of the person who furnished the service (DG-2.3) / Signature _____ Printed name _____ Credential _____ Date signed _____	A line labeled Provider collects a name, an initial, or a stamp. DG-2.3 asks for a signature and for three things beside it, and a printed name is what lets a later reader identify the writer.
6	(no abbreviation instruction on the form)	Expand each abbreviation at its first appearance in this note (DG-2.6).	The rule at DG-2.6 governs the whole note and appeared only in the guidance document. Printing it in the form header puts it in front of whoever is writing.
7	(no retention line on the form)	Retained seven years from the date of service (DG-2.9).	The period was recorded in the guidance and not on the page that gets filed. Whoever pulls the note years later reads the form, not the guidance.