



# The Progress Note Companion

**A Side-by-Side Guide for Therapists in the Becoming**

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# How to Use This Companion

A short, grounding preface.

This is not an example of a “perfect note.”  
It is an example of a *real* one becoming clearer.

Invite the reader to notice:

- How thinking becomes visible
- Where the spine shows up
- What gets trimmed without losing meaning

Name explicitly that this is an **apprenticeship tool**, not a grading rubric.

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## Section 1: Before We Begin

### What You’re About to See (And What You’re Not)

Set expectations gently:

- The first note is not “bad”
- The second note is not “ideal forever”
- Both reflect care
- One reflects clearer clinical reasoning

You might name this framing:

This is not about writing less.  
It’s about writing *with purpose*.

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## Section 2: The Session Snapshot (Context Only)

Provide a brief, neutral snapshot so the reader isn’t disoriented.

For example:

- Client diagnosis
- Treatment focus
- Setting (telehealth or in person)

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- General theme of the session

Keep it short. This mirrors real-world chart review.

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## Section 3: The “Messy” Progress Note

### (A Very Common Early-Career Version)

This note should:

- Be thoughtful
- Be caring
- Be slightly too long
- Include narrative that feels true but floats
- Under-anchor to diagnosis
- Under-demonstrate clinical judgment

Important:

Do **not** make this note sloppy or incompetent. It should read like something a good, conscientious pre-licensed therapist would actually write.

Readers need to recognize themselves in it.

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## Section 4: Margin Notes

### What’s Working, What’s Floating, What’s Missing

This is where the companion becomes gold.

Alongside the messy note, add margin commentary like:

- “True, but doesn’t earn its place”
- “This belongs in the room, not the chart”
- “Good observation, now anchor it to diagnosis”
- “Clinical judgment happened here but isn’t visible yet”

Tone matters here. Curious. Kind. Precise.

Think mentor, not auditor.

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## Section 5: The Spine Check

Introduce the anchor sentence again:

Today's session was medically necessary because...

Show:

- What that sentence *might* be for this case
- How it immediately clarifies what stays and what goes

This reinforces learning from the blog in an embodied way.

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## Section 6: The Refined Progress Note

### Same Session, Clearer Map

Now present the revised note.

This version should:

- Be shorter
- Be more diagnosis-anchored
- Show assessment, response, and plan clearly
- Demonstrate judgment if anything sensitive occurred
- Feel calmer to read

Do **not** over-polish. It should still feel human.

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## Section 7: What Changed (And Why It Matters)

Break this into short reflections, not bullets if you prefer narrative:

- What was removed and why
- What stayed but shifted language
- Where diagnosis became visible
- How medical necessity is now obvious

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- How the therapist's competence is clearer with fewer words

This is where insight locks in.

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## **Section 8: The Invisible Wins**

Name what often goes unnoticed:

- The refined note is easier to write
- It's easier to reread later
- It's easier to defend ethically
- It helps the therapist leave the session behind

You might say something like:

Good documentation doesn't just protect you legally.  
It protects your energy.

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## **Section 9: A Gentle Reminder for Pre-Licensed Therapists**

Close with reassurance.

Name again:

- Notes evolve
- Fluency comes with repetition
- Supervision is part of the process
- No one expects perfection

This companion should leave the reader steadier than when they began.

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