



# TELETHERAPY PROGRESS NOTE TEMPLATE

# TELETHERAPIST NETWORK



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## Teletherapy Progress Note Template

As you review this teletherapy note template, you might notice that there are some fields that aren't usually recorded in a traditional in-person therapy session. The distance that teletherapy allows between therapist and client can be an added convenience, or a potential pitfall. Because of this, we've included several sections in this note template to help therapists improve the quality of teletherapy documentation.

### Patient's Location

Unlike an in-person therapy session, you might not know where your client is physically located. Confirming their location (yes, with an exact address) at every session is important in case you need to dispatch any type of emergency resources.

### Local Crisis Response Team

Doing telehealth, we can see anyone in the area we are licensed, even if they are hundreds of miles away. When we call for emergency services (like 911) our call will route to *our* nearest emergency dispatch location, even if it is far from our client in need of emergency services. It is important to have the phone number of the crisis response team or hospital local to your client at the time of each session. Normally, this number will remain the same if your client joins the session from one location, like their home or work. However, if the client is traveling or at a new location, you will need to take time in session to identify the contact information of the crisis response team local to the client's current location.



### **Patient's Back-Up Phone Number**

Confirming your client's back-up phone number at each session will take a few seconds and save you a mountain of headache, should you need to enact your disconnection plan. Clients in rural areas often need to switch between cell phone and landlines, depending on their location.

### **Patient's Emergency Contact**

Confirm the client's emergency contact for each session. Sometimes, the original emergency contact given at the time of intake is traveling or unavailable at the time of the session.

### **Time Spent Disconnected**

Another unique aspect to teletherapy is the ability to be disconnected from your client during the session duration. Make sure to document the amount of time spent disconnected and understand how it may or may not apply to your specific insurance reimbursement agreement.

### **Video Scan of Client's Environment**

Get into the routine of asking your client to scan their environment with their webcam at the start of each session. This extra layer of screening will prevent others from attending the session without your knowledge, as well as give you additional information about their environment (i.e. risks, cleanliness, etc.)

### **Telecommunications Used**

Teletherapy or telehealth is any mental health service provided by telecommunication means, including video, audio and text exchanges. Make sure to document which types of telecommunication modes you used during each session.



### **Review of Privacy at Client's Location**

Regularly ask your client if their environment is private, secure and quiet at the start of each session. Some therapist/client combos even come up with code words for the client to use if their privacy is breached and they want to let the therapist know without calling attention to themselves.

### **Confirmed No Recording**

Unless otherwise consented to, confirm that neither client nor therapist will record the contents of the therapy session. Always double check if you have any doubt.



## Teletherapy Progress Note Template

Date of Service:

Session Number:

Patient Name:

Service: *[usually CPT code or description of service]*

Patient's location:

Local crisis response team:

Patient's back-up phone #:

Patient's emergency contact:

Start time:

Stop time:

Time Disconnected:

Other parties present at session:

- Client scanned the environment with camera to confirm that no other parties are present at session

Telecommunications used:

- Video  
 Telephone  
 Text Exchange  
 Other

Telehealth privacy:

- Reviewed the importance of privacy at the client's location  
 Confirmed that neither party will record the session without permission

Treatment Modality/Interventions: *[insert specific interventions used in session and why you used them]*

Treatment Goals: *[insert treatment goals actively worked on in session]*

Session Narrative/Observation (S/O): *[insert client's presenting problem as described in their own words and your specific and measurable observations]*

Treatment Response/Progress (A): *[insert summary of the client's situation, their goals and reasons to continue treatment.]*

Diagnosis: *[if using a diagnosis, enter it here]*

Treatment & Follow-up Plan (P): *[insert what you plan to do to treat the client and how the plan will help them achieve their goals]*

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