**Format for Summary Recording**

(Your agency may have their own format)

**DUE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Student name: Date of session: Session Number:

Client Identifying Info:

Reason(s) for referral and/or presenting problem(s):

Purpose of this session (why client is being seen):

Objectives/goals of this session:

Summary of Dialogue and Content (i.e. major themes, selected excerpts, etc.):

Observations--Impressions/Thoughts/Feelings:

Assessment/Analysis of the Session:

1. Identify and describe the stage of work with client/client system (i.e., pre-engagement,

engagement, assessment, intervention, evaluation).

2. What did you learn from the session that adds to your understanding of the client?

3. What were the major themes (manifest vs. latent content)?

4. What were the challenges presented?

5. How do you think the client experienced the session?

6. What concepts or theories did you apply?

7. Questions for Field Instructor:

8. Next Steps/Plans for the future session(s):