

S.O.A.P. Progress Note Checklist

S Subjective <i>Client statement capturing the theme of the session</i>	Check if Addressed
1. Subjective data about the client—what are the client’s observations, thoughts, direct quotes?	
2. Does the client’s direct quote summarize the theme of the session?	
O Objective <i>Objective, often observable data or information supporting the subjective statement</i>	
3. Objective data about the client—what does the counselor observe during the session (affect, mood, appearance)?	
4. Does objective data or information match the theme expressed in the subjective statement?	
A Assessment <i>Counselor’s assessment of the situation, the session, and the client’s condition or prognosis Client’s response to intervention and progress made in achieving tx plan goals / objectives</i>	
5. What is the counselor’s understanding about the problem?	
6. What are the counselors’ working hypotheses?	
7. What was the general content and process of the session?	
8. Was homework reviewed (e.g., journal, reading assignments – if any)?	
9. What goals, objectives, interventions were addressed this session?	
10. What is the client’s current response to the treatment plan?	
P Plan <i>Document what is going to happen next</i>	
11. What in the treatment plan needs revision?	
12. What is the counselor going to do next?	
13. When is the next session date?	
General Checklist	
14. Does this note connect to the client’s individualized treatment plan?	
15. Are client strengths/limitations in achieving goals noted and considered?	
16. Is this note dated, signed, and legible?	
17. Is the client name and identifier included on each page?	
18. Has referral information been documented?	
19. Does note reflect changes in client status (e.g., GAF Scale, measures of functioning)?	
20. Are any abbreviations used standardized and consistent?	
21. Would someone not familiar with this case be able to read this note and understand exactly what has occurred in treatment?	
22. Are any non-routine calls, missed sessions, or professional consultations regarding this case documented?	
22. Did counselor/supervisor sign note?	