

FIGURE 5.1. General Template and Instructions for Progress Notes

<i>General Template and Instructions for Progress Notes</i>	
Session # _____ Date: _____ Coach: _____	
Client Name is a xx-year-old (include relevant demographic characteristics)	
Provide one to two paragraphs that include the following information (once you write this section, it will likely remain the same throughout the course of coaching, unless something changes):	
• Difficulties the client is experiencing, such as time management, organization, inattention, procrastination, sleep difficulties, or eating concerns • Diagnoses client may have, such as ADHD, depression, or anxiety • Medication information (type, dosage, whether taking consistently) • Counseling information, if applicable (how often, where he or she attends, whether it is helpful) • Any other important information that would be useful to know, such as whether the client is on academic probation or has been fired from a job • What the client hopes to improve over course of coaching	
Long-Term Goals: (these are the long-term goals established in session one)	
• _____ • _____ • _____	
<i>Prior Week's Progress:</i>	
Progress Toward Last Week's Objectives: (How much of each objective did the client complete? If he or she modified the objective during the week, include that information.)	
• Objective A: _____ • Objective B: _____ • Objective C: _____	
Weekly Successes and What Contributed to Successes: (Include anything that helped the client reach his or her objectives, such as social support, having a plan for accomplishing the objective, writing down steps to complete objective)	
• _____ • _____ • _____	
Obstacles: (What obstacles did the client face? If the client overcame the obstacle, how did he or she overcome it?)	
• _____ • _____ • _____	

(continues)

Plans for Upcoming Week

Weekly Objectives:

1. _____

2. _____

3. _____

Incentives and Consequences:

- Objective A: (State the incentive/consequence)
- Objective B: (State the incentive/consequence)
- Objective C: (State the incentive/consequence)

Potential Obstacles: (What obstacles might the client face this week in accomplishing his or her objectives? What are the plans if the client faces this obstacle?)

Plan for Next Session: We will meet next _____ (date) at _____. Throughout the week, coach will _____ (could state that you will send the client text or e-mail reminders, or anything else you might do throughout the week to help the client). During our next session, we will _____ (plan for next session).