

Case Note Checklist

(Distilled from King,R. Record keeping in psychotherapy. Psychotherapy in Australia, vol 16 no 3, 2010, p 49-52)

Case Notes should be:

- Confidential
- Adequate
- Essential
- Relevant
- Kept for 7 years following the end of therapy for adults
- And up to and including the age of 18 for children.
- Stored in a locked filing cabinet if in hard copy
- In an encrypted file if kept electronically

A record of:

- Each meeting in person, by telephone, or email or text that you have with your client.
- Any risk assessment you have done
- Referral you have provided for your client
- Direct advice you have given