



Good Practice in Note-Taking

Feltham and Dryden (1993, p. 122) define note-taking as 'writing observations on clients'.

Why We Take Counselling Notes

Note-taking has many uses, such as:

- serving as an aid to memory
- noting actions you have taken, e.g. made a referral
- recording any contact between sessions
- reminding you of information you need to share with the client, such as when you are on leave, or how many sessions are left.

It can be very helpful to review your counselling notes before clinical supervision, and it is wise to discuss your note-taking practice with your supervisor. Rye (2017: 123) writes: 'You need to discuss with your supervisor to check that your notes are appropriate for your professional needs and comply with the requirements of the Information Commissioner's Office.'

What to Consider in Taking Notes

When writing clinical notes, there are various things to consider:

- Notes should contain purely factual information about the session and not your opinion, analysis or fantasy about what is going on for the client.
- If you are using an active-directive approach, such as cognitive behavioural therapy (CBT) or transactional analysis (TA), you may wish to highlight interventions that you used. For example, you might write: 'I set the client a homework task to write ten positive thoughts they had this week.'
- Under the General Data Protection Regulation (GDPR), clients can access the notes that you write about them.
- Paper notes must be securely held in a locked filing cabinet, with access available only to the counsellor.
- If notes are stored electronically, then the computer or device must be password-protected.
- If you work for a counselling agency, organisational procedure may require you to store all client notes on their system.

What Ethical Bodies and Insurance Providers Say about Counselling Notes

Ethical bodies often have requirements regarding note-taking. For example, the British Association for Counselling and Psychotherapy (BACP, 2018, p. 6) states: 'We have agreed that we will ... work to professional standards by ... keeping accurate and appropriate records.'

Similarly, the United Kingdom Council for Psychotherapy (UKCP) notes: 'As a practitioner, you must ... make notes appropriate to the modality of therapy being practised, and keep records which are accurate, legible and timely' (2019, pp. 1, 3).

Guidance varies on the length of time that notes should be stored after the client has left therapy. However, insurance companies usually recommend that notes are kept for between five and seven years, at which point they can be securely destroyed. It is important to check with your insurance company and – if you work for a counselling agency – to observe any relevant organisational procedures.

References

BACP. (2018). Ethical Framework for the Counselling Professions [online]. *BACP*. [Viewed 18/1/23]. Available from: <https://www.bacp.co.uk/media/3103/bacp-ethical-framework-for-the-counselling-professions-2018.pdf>

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Rye, J. (2017). *Setting Up and Running a Therapy Business*. London: Karnac.

UKCP. (2019). UKCP Code of Ethics and Professional Practice [online]. *UKCP*. [Viewed 18/1/23]. Available from: <https://www.psychotherapy.org.uk/media/bkjdm33f/ukcp-code-of-ethics-and-professional-practice-2019.pdf>