



11 Common Health Plan Progress Notes Requirements

1. Actual therapy start and end times, ex. "1:05-1:55 pm" (*does not include time spent waiting for client, scheduling, or documenting*)
2. Date and client's name on each page
3. Service type (ex. individual, couples, group)
4. Problem statement, description/quotes
5. Interventions (may include homework assigned)
6. Client strengths / limitations or barriers
7. Functional impairments
8. Client in-session behavior / mood
9. Support for diagnosis / medical necessity for treatment
10. Progress or lack of (*note: use of questionnaires helpful*)
11. Date of next appointment

Would your progress notes pass an insurance plan review? Book a consultation with me at www.calendly.com/barbgris, then send a few of your notes, and I'll be happy to give you non-shaming, supportive feedback. Or check out my pre-recorded webinar "What's Missing from Your Charts: Writing Great Progress Notes" at theinsurancemaze.com/store.

As always, feel free to contact me with your insurance, documentation, or practice business questions.

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