

ADMINISTRATIVE RECORD · NOT A CLINICAL TREATMENT NOTE

Nonclinical session record

Internal client
reference

Session date and time

Service name

Duration

Practitioner name

Setting

☐ In person ☐ Remote

Administration

☐ Attended ☐ Rescheduled ☐ Cancelled
☐ Ended early

Preferences confirmed and any changes requested Up to 300 characters.

Brief factual session summary Up to 500 characters. No diagnosis or assumed cause of a feeling.

Client statement relevant to follow-up (optional) Use the client's words and label it as reported, not a clinical finding.

Administration: explain only what is necessary

Administrative next action (optional)

Owner

Due date

Record author

Date recorded

Amendments (dated and attributed; never obscure the original author and date)

Date	Author	Amendment

PRACTITIONER INSTRUCTIONS

Using the session record

Keep a brief administrative record of what was agreed and what happened during a session. This template avoids diagnostic labels and does not present itself as a clinical treatment note.

RECORD-KEEPING PRINCIPLES

Record observable facts and agreed administrative actions. Do not label a client with a condition, infer a treatment result, or copy private information that is unnecessary for your service. Store this record through your practice process. Do not send completed records to Holistic Healer.

Customization and quality check

Use a consistent retention/access policy reviewed for your circumstances. Corrections must not obscure the original author/date.

Worked example (fictional)

Example: Client requested lower lighting; no-touch preference confirmed; session ended at agreed time; requested next available appointment.

Do not write: energy imbalance cured.

Customization checklist

- ☐ Use a consistent retention/access policy reviewed for your circumstances.
- ☐ Corrections must not obscure the original author/date.
- ☐ Do not write: energy imbalance cured.
- ☐ Store completed records through your practice process. Do not send completed records to Holistic Healer.

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