



ReasonNotes

FREE CLINICAL RESOURCE

Progress Note Templates

Templates for ongoing care, treatment goals and follow-up sessions.

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TEMPLATE 1: Primary Care Follow-up

Follow-up Date: [Date]

Interval since last visit: [Time period]

SUBJECTIVE

Patient reports [symptoms/concerns]. Compliance with medications: [compliance status]. Any new symptoms: [new symptoms or 'none'].

OBJECTIVE

Vital signs: BP [value], HR [value], Weight [value]. Physical exam: [relevant findings]. Lab results: [if applicable].

ASSESSMENT

Condition: [improved/stable/worsened]. Current medications: [effective/needs adjustment]. Overall progress: [assessment].

PLAN

Continue [current treatments]. Modify [any changes]. Next visit: [timeframe]. Patient education: [topics discussed].

TEMPLATE 2: Mental Health Therapy

Session Date: [Date] Session #[number] of [total planned]

SUBJECTIVE

Client reports mood as [rating/description]. Sleep: [quality/hours]. Anxiety/depression levels: [scale rating]. Medication compliance: [status].

OBJECTIVE

Appearance: [grooming/dress]. Mood/affect: [observed]. Speech: [rate/volume]. Thought process: [organized/disorganized]. Insight: [level].

ASSESSMENT

Progress toward goals: [specific progress]. Therapeutic alliance: [quality]. Symptom severity: [improved/same/worse]. Treatment response: [effectiveness].

PLAN

Continue [interventions]. Homework: [assignments]. Next session focus: [topics]. Frequency: [schedule]. Referrals: [if needed].

TEMPLATE 3: Physical Therapy

Treatment Date: [Date] Visit #[number], [weeks] post-injury/surgery

SUBJECTIVE

Pain level: [0-10 scale]. Functional limitations: [specific activities]. Sleep quality: [impact]. Medication use: [frequency].

OBJECTIVE

Range of motion: [measurements]. Strength: [grades]. Balance: [assessment]. Gait: [observations]. Functional tests: [results].

ASSESSMENT

Impairments: [current status]. Functional progress: [percentage/description]. Goal achievement: [met/partially met/not met]. Prognosis: [outlook].

PLAN

Continue [exercises/modalities]. Progress [specific activities]. Home program: [modifications]. Next visit: [focus]. Discharge planning: [timeline].

PROGRESS MEASUREMENT TOOLS

- PHQ-9: Depression screening, every 2-4 weeks, track decreasing score
- GAD-7: Anxiety assessment, every 2-4 weeks, track reduced symptoms
- Pain Scale (0-10): Each visit, track decreasing ratings
- Functional Status: Weekly, track improved independence
- Goal Attainment: Each session, track percentage of goals met