

## **Sample Case Notes and Professional Email Correspondence – Compassion House (De-identified)**

**Student:** Brooke Holloway

**Placement Site:** Compassion House

**Competency:** 1.4 Demonstrate Professional Oral & Written Communication Skills

**Confidentiality:** All content below is de-identified. No client names, initials, dates of birth, addresses, case numbers, school names, or identifying details are included. Scenarios are generalized to demonstrate professional documentation and communication.

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### **Part A: Sample Progress Note 1 (De-identified) — Client A (*based on “April” themes*)**

**Client:** Client A (De-identified)

**Service Type:** Individual Session

**Duration:** 30 minutes

**Presenting Concern:** Increased stress with mixed mood presentation; avoidance around a family topic; transition-related stress.

#### **Intervention/Session Summary:**

Clinician met individually with client. Client reported overall relief related to a recent transition (e.g., completion of a major responsibility), but appeared guarded and emotionally preoccupied. Client declined to discuss a specific family-related topic and demonstrated avoidance when prompted. Clinician utilized active listening, reflection, and normalization, and provided supportive counseling focused on emotional identification and regulation. Clinician explored coping strategies and reinforced client autonomy and pacing regarding sensitive topics. Safety and supports were briefly reviewed.

#### **Client Response:**

Client engaged appropriately, maintained boundaries regarding the topic they were not ready to discuss, and participated in coping review. Affect appeared constricted at times, with signs of distress noted through nonverbal behavior. No acute safety concerns reported.

#### **Plan/Next Steps:**

Continue individual sessions. Clinician will revisit readiness to explore the family-related stressor using a trauma-informed approach and will support client in identifying coping strategies for distress between sessions. Client will practice one grounding strategy daily and will identify one safe support person or coping activity to use when feeling overwhelmed.

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**Part B: Sample Progress Note 2 (De-identified) — Client B (based on “Kyleigh” themes)**

**Client:** Client B (De-identified)

**Service Type:** Individual Session

**Duration:** 50 minutes

**Presenting Concern:** Family instability and emotional distress related to caregiver substance use and household conflict; feelings of betrayal and lack of safety.

**Intervention/Session Summary:**

Client presented tearful and reported heightened stress related to changes in the home environment, including caregiver relapse concerns and ongoing substance use within the household. Clinician provided supportive counseling, validated emotional response, and assessed current coping and safety supports. Clinician used CBT-informed interventions to identify automatic thoughts (e.g., helplessness, anger, fear) and supported cognitive reframing toward controllable next steps. Clinician explored boundaries, support systems, and safe adults/resources. Clinician reinforced healthy coping strategies and discussed a brief plan for emotional regulation during acute stress (breathing, grounding, step-away plan).

**Client Response:**

Client engaged in session, demonstrated insight into emotional triggers, and was able to identify at least one coping strategy and one support option. Client reported feeling “heard” and slightly calmer by session end. No immediate self-harm intent reported; clinician monitored for safety given intensity of stress.

**Plan/Next Steps:**

Continue weekly sessions. Client will track mood and triggers for one week and practice a grounding strategy during stress spikes. Clinician will continue skill-building focused on emotion regulation, boundaries, and safety planning, and will assess whether additional supports/referrals are needed based on ongoing household instability.

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**Part C: Sample Professional Email 1 (De-identified)**

**Subject:** Coordination Request – Service Connection Follow-Up (De-identified)

Hello [Role/Title],

I hope you are doing well. I am following up to coordinate next steps regarding a de-identified client system who is seeking connection to recommended supports. At your

convenience, could you confirm the appropriate process and timeline for service initiation, as well as any documentation needed to proceed?

Thank you for your time and support. Please let me know if there are any questions or additional information needed within confidentiality guidelines.

Respectfully,  
Brooke Holloway, MSW Student Intern  
Compassion House

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**Part D: Sample Professional Email 2 (De-identified)**

**Subject:** Scheduling Request – Consultation Availability (De-identified)

Hello [Role/Title],  
I am requesting a brief consultation to discuss coordination of supports for a de-identified client system. I am available [Day/Time Option 1] or [Day/Time Option 2]. If another time works better, I am happy to accommodate.

Thank you,  
Brooke Holloway, MSW Student Intern  
Compassion House