



**North Carolina Central University  
Department of Allied Professions  
“Communicating to Succeed”**



**The School of Education’s Vision:**

To Prepare Educators for Diverse Cultural Contexts and Advance Teaching, Scholarship, and Service through Diversity, Partnership, and Technology.

**Counselor Education Mission:**

North Carolina Central University is located in Durham, a fairly urban area in central North Carolina. Nearby regions include rural areas, as well as the Research Triangle Park. The Counselor Education Program prepares professional counselors to work in career, school, and mental health settings who promote development across the lifespan, advocate for systemic change, and respond to the complexity of human needs associated with a diverse society. Faculty are expected to teach and mentor students, serve the community and profession, and conduct and disseminate research.

**CON 5372 – (03) – Supervised Practicum in Counseling  
Spring 2026  
SYLLABUS**

**Instructor Information**

**Name:** Dr. Levette S. Scott  
LCMHS, Licensed K-12 School Counselor (NC), NCC, EMDR  
Former Associate Professor and Director of Career Counseling Program

**Location:** Virtually

**Email:** [Levette.scott@nccu.edu](mailto:Levette.scott@nccu.edu) and [scottlevette50@gmail.com](mailto:scottlevette50@gmail.com)  
You will receive a response from me in 24 hrs. If you email me on a weekday (after Friday) expect a response by Monday during virtual office hours.  
**Grade Turn-Around:** Feedback and grading will take one week after due date.

**Alternate:** Juls Joyner (Administrative Assistant: 919-530-7289)

Office Hours: Please call for office hours.

**About This Course**

**Mandatory Class**

**Date:** Tuesday - 6:00 pm – 7:30 pm

**Triad Meetings:** Tuesdays: 5 pm – 6 pm or sometimes 7:30 – 8:30 pm

**Course Location:** Online

**I. COURSE DESCRIPTION AND PRE-REQUISITION**

Prerequisites: Phase 2 completion and a B or better in CON 5371. Advanced candidates in counseling will participate in a clinical instructional environment under the supervision of a faculty member. Candidates will receive supervision from a faculty member as they obtain individual and group counseling experience. The practicum is a 100-hour field experience in a mental health, career, or school counseling setting.

This course is a 3-semester hour graduate credit class and is a requirement for all counseling majors.

**II. METHODS OF INSTRUCTION**

This supervision course will be delivered online and makes use of a variety of instructional methods, including but not limited to: class readings, group discussion, case presentations, peer feedback, research presentations.

**III. TEXTS AND OTHER RESOURCES**

**Required**

This class utilizes Canva and Google. Students will find required readings on the Canva site and google share for this course. Students should become familiar with the following websites (descriptions are links): NCCU Counselor Education Program American Psychological Association APA Writing Style Page American Counseling Association  
*Required readings will be made available on Canva throughout the semester.*

Online resources <http://www.nccucounseling.com>:  
 Counselor Education at NCCU. <http://www.apastyle.org/>:  
 American Psychological Association APA Writing Style home page <http://www.counseling.org/>: American Counseling Association.  
[NCCU Counselor Education Program](#)  
[American Psychological Association APA Writing Style Page](#)  
[American Counseling Association](#)

**Other Suggested Text & Readings:**

American Psychological Association (2020). *Publication Manual of the American Psychological Association* (7th Edition). Author

Halbur, D.A., & Halbur, K.V. (2019). *Developing your theoretical orientation in counseling and psychotherapy*. Pearson. ISBN-13: 978-0134805726 ISBN-10: 0134805720

Ivey, A. E., Ivey, M. B., & Zalaquett, C. P. (2018). *Intentional interviewing and counseling: Facilitating client development in a multicultural society* (9th ed.). Brooks/Cole. ISBN: ISBN: 978-1305-865785

**Recommended:**

**Technology Needed:** Headphones, camera, speakers, working internet, Google account. Google can be downloaded on your phone (*The Google program is free*)

**IV. STUDENT LEARNING OUTCOMES**

CON 5372 Student Learning Outcomes (SLOs) The corresponding CACREP standards met in this class are listed here. <i>At the completion of this course:</i>	<b>METHOD FOR OBTAINING OUTCOME</b>	<b>METHOD FOR EVALUATION OF OUTCOME</b>
Students complete supervised counseling practicum experiences that total a minimum of 100 clock hours over a full academic term that is a minimum of 10 weeks. At least 40 of the clock hours must be of direct service with actual clients that contributes to the development of counseling skills (Section 3, F & G)	Clinical Placement in approved site	Hour Log, Final Evaluation form
Practicum students have weekly interaction with supervisors that averages one hour per week of individual and/or triadic supervision throughout the practicum by (1) a counselor education program faculty member, (2) a student supervisor who is under the supervision of a counselor education program faculty member, or (3) a site supervisor who is working in consultation on a regular schedule with a counselor education program faculty member in accordance with the supervision agreement (Section 3, H)	Weekly triadic supervision meetings, site supervision meetings	Hour log, attendance, session review forms

<p>Practicum students participate in an average of 1½ hours per week of group supervision on a regular schedule throughout the practicum. Group supervision must be provided by a counselor education program faculty member or a student supervisor who is under the supervision of a counselor education program faculty member. (Section 3, I)</p>	<p>Weekly group supervision meetings</p>	<p>Hour log, attendance</p>
<p>Students will apply counseling theory in professional practice with clients who represent ethnic and demographic diversity in their community. (Section 3, General)</p>	<p>Clinical placement in approved site, readings</p>	<p>Audio/video recordings with session review forms, case presentation, case note assignment</p>
<p>Students will develop their counseling skills under supervision from a Program faculty member (development is relative and specific to each student). (Section 3, General)</p>	<p>Clinical placement in approved site; supervision meetings; readings</p>	<p>Audio/video recordings with session review forms, case presentation, mid-term evaluation and final evaluation</p>
<p>Students will have the opportunity to become familiar with a variety of professional activities and resources, including technological resources, during their practicum and internship. (Section 3, D)</p>	<p>Clinical placement in approved site; group supervision discussions; readings</p>	<p>Log, case note assignment, mid-term and final evaluations</p>
<p>Students will examine the effects of power and privilege for counselors and clients, as well as examine strategies for identifying and eliminating barriers, prejudices, and processes of intentional and unintentional oppression and discrimination. (Section 2, F. 2.e. &amp; h.)</p>	<p>Clinical placement in approved site; supervision discussions; readings</p>	<p>Case note assignment, audio/video recordings with session review forms, case conceptualization</p>
<p>Students will be able to identify and describe interrelationships among and between work, mental well-being, relationships, and other life roles and factors. (Section 2, F. 4.b.)</p>	<p>Clinical placement in approved site; Readings; supervision discussions</p>	<p>Audio/video recordings with session review forms, case conceptualization</p>

Students will be able to articulate a general framework for understanding and practicing consultation. (Section 2, F. 5.c.)	Clinical placement in approved site; supervision discussions	Audio/video recordings with session review forms, case conceptualization
Students will practice essential interviewing, counseling, and case conceptualization skills, including suicide prevention models and strategies. (Section 2, F. 5. g. & l.)	Clinical placement in approved site; supervision discussions; readings	Audio/video recordings with session review forms, role play
Students will implement and analyze the efficacy of counseling treatment plans with their clients. (Section 2, F. 5. h.)	Readings, direct hours with clients; supervision discussions	Session review forms
Students will create and monitor tangible goals with clients to support positive counseling outcomes. (Section 2, F. 5. i.)	Clinical placement in an approved site; readings; supervision discussions	Goal construction exercise; audio/video recordings with session review forms; case conceptualization
Students will research and apply evidence based practices with their clients/students. (Section 2, F. 5. j.)	Supervision discussions; lecture	Bridging research and practice assignment; case conceptualization; audio/video recordings with session review forms
Students will identify and suggest referrals as needed to clients/students. (Section 2, F. 5. k.)	Lecture; supervision discussions	Direct hours on hour log; case conceptualization; audio/video recordings with session review forms
Students will identify processes for aiding in their development of a personal model of counseling. (Section 2, F. 5. n.)	Readings; supervision discussions	Audio/video recordings with session review forms; case conceptualization
Students will examine the theoretical foundations of group counseling and group work. (Section 2, F. 6. a.)	Readings; supervision discussions	Audio/video recordings with session review forms; case conceptualization
Students will examine therapeutic factors and understand how they contribute to group effectiveness. (Section 2, F. 6. c.)	Readings; supervision discussions	Audio/video recordings with session review forms; case conceptualization
Students will be able to identify the methods of effectively preparing for and conducting initial assessment meetings. (Section 2, F. 7. b.)	Readings, supervision discussions	Audio/video recordings with session review forms; case conceptualization
Students will examine the importance of research in advancing the counseling profession, including how to critique research to inform counseling practice. (Section 2, F. 8. a. & b.)	Group supervision discussions; readings	Bridging research and practice assignment

## V. COURSE FORMAT AND WEBSITE

This course has weekly, synchronous, meetings on Google for group and triadic supervision. Canva is utilized to submit assignments, and Google Drive is utilized to submit recorded work. The syllabus, assignments, readings, and other materials related to the course can be found on Canva. Please ensure that you have complete access to the course on Canva by the end of the first week of class. If you have questions about your Canva account, please

contact the campus Helpdesk at <http://www.nccu.edu/facultyandstaff/its/helpdesk.cfm> or contact the Eagle Technical Assistance Center (ETAC) at 919-530-7676.

All content is posted or linked on Canva which is the Learning Management System used by NCCU (<http://nccu.Canva.com>). Every student has a username and password issued by the University. You are required to log on to the Canva system at least once per week in order to view course content which includes lectures from the instructor, supplemental lectures, web links, as well as other content. You are also required to submit assignments via Canva during the semester. Emailed assignments will not be scored. If you have questions about your Canva (Bb) account, please call Bb or the IT department at 919-530-7676.

## **VI. COURSE POLICIES**

### Counseling Department Attendance Policy for Practicum Class

Class attendance, punctuality, and participation are required and necessary to accomplish the goals of the course. Aside from successfully completing the required field experience hours at the designated site, and obtaining regular supervision from the site supervisors, practicum students are also required by CACREP to have weekly group supervision and weekly triadic supervision from the university internship supervisor. Practicum students are expected to attend all scheduled class meetings and may not miss more than 2 class meetings. If a student misses more than 2 practicum class/group supervision meetings, they can be dropped from the course and/or not receive a passing grade for the course.

Each **unexcused** absence will result in a **50-point deduction** from your participation/attendance grade. **Three absences (including class and triadic supervision) will result in a failing grade** for the course. In addition, it is expected that all assignments will be handed in on time. Students are encouraged to reach out to the instructor with any questions/concerns and asked to inform the instructor of any potential issues in regard to attendance/participation. Any assignment or homework handed in late will receive reductions in five points for each day late. Other areas of participation including engagement in group and triadic supervision by coming prepared with having read assigned readings; participating in discussion; timeliness of attendance etc. are expected. If expectations are not met in these areas it will be addressed with the student and up to the discretion of the instructor if points will be taken off the total participation grade.

### Student Liability Insurance through NCCU

Beginning in the fall of 2019, *the \$15.00 liability insurance fee will now be on student's Tuition and Fee statement* each semester they register for clinical field placement. If a student drops Practicum or Internship AFTER the Drop/Add period, their \$15.00 liability insurance fee will NOT be refunded. If same student registers for Practicum or Internship the following semester, they will be charged AGAIN for the \$15.00 liability insurance fee.

### Technical Specifications related to our Course Supervision

- Individual and group meetings will be held using Zoom videoconferencing software. It is available (for free) in desktop, laptop, tablet, and smartphone formats.
- If you will use a desktop or laptop computer, you can enter a test meeting at any time (to test your equipment):
- If using a smartphone or tablet, download the Zoom app. Search your app store for "Zoom" or Cisco Zoom meetings.
- Connection will require a private, stable, high-speed internet connection. If you will use a smartphone, you will need a strong cell signal.
- Please make sure that you have a microphone and video camera enabled on whatever computer or device that you will use to connect. Video and audio are required. Once you enter the meeting space, you will need to activate or enable both your audio and video.

### Responsibilities and Requirements for Video-based Triadic and Group Supervision

- Each student is responsible for ensuring that they have the software and devices necessary to participate in every supervision meeting.
- Each person (student and instructor) is required to use headphones or earbuds for every supervision meeting. This is important for technical reasons (to reduce audio feedback), but it is also important to maintain confidentiality.
- When participating in supervision, students should be at a location that provides a stable high-speed internet connection.
- When participating in a supervision meeting, the student should be located in a private and closed room (i.e., behind a closed door, just like you were meeting with the instructor in her campus office). You should NOT be located in a public setting, where others may hear the conversation. If at home, you will need to ensure that you have a private and undisturbed environment in which to meet. If your computer is located in a common room, you will need to ensure that you are meeting during a time in which no one else is home. You will be playing recordings of your counseling sessions during individual supervision meetings, and you MUST ensure the confidentiality of your client recordings.
- Turn off (or mute) all telephones, televisions, music players. If you are using a smartphone, please silence calls or activate “do not disturb” in order to prevent interruption with phone calls.
- Please treat each supervision meeting as you would if you had an appointment scheduled with your site supervisor at a campus location. The technology that is used to hold our meetings can be a bit deceptive regarding boundaries, because:
  - you may be located in a familiar and relaxing environment (e.g., your home),
  - you do not have to travel to a campus or professional location for supervision.
- People have been known to dress very casually (e.g., pajamas), conduct other household chores while meeting for supervision (e.g., washing dishes), or show up late for a scheduled meeting. A good rule to live by: Do not dress in any way – or engage in any activities – that you wouldn’t do if you were physically sitting beside the instructor on campus.

### Confidentiality

Much of our class discussion and most of the written work you do for this class will contain information about clients, and sometimes sensitive information about your supervisor and internship site. All of this information is privileged. We share responsibility for maintaining its confidentiality and protecting the privacy of our clients, classmates, host sites, and sometimes supervisors and other professionals.

*Guidelines for fulfilling our responsibility to confidentiality include the following matters:*

- Written materials (e.g. journal entries, special projects, tape critiques, etc.) referring to clients should either refer to them by initials only or by a pseudonym. If the materials are copied and contain the client’s name, the name should be blocked out with a black felt tip pen if possible so that you cannot see the name.
- Video and audio recordings of client counseling sessions should be kept secure and should be erased after instructional and supervisory reviews are completed.
- Video and audio recordings should not be sent via email. You will submit them via Google Apps for Education as directed by your university/faculty supervisor.
- Classroom/office doors will be closed when we are discussing cases or viewing videos of actual clients. This includes scheduled and impromptu supervision or consultation meetings.
- Guests such as students from other environments or classes, prospective students, family members, or children may not be brought to class. This means, they may not be in the same room/meeting space with you while you are meeting with your university supervisor.
- Your Case Presentation should be uploaded into Blackboard. Any time you mention a client in your project, you should utilize either their initials or a pseudonym.
- All client records are the property of your internship site. No client records or files of information from your internship site are to be kept in your personal possession (e.g. your car or home or stored on your personal electronic devices) except for the temporary necessity of carrying selected copies of information on which identifying information has been removed or thoroughly covered.

- Any departure from strict adherence to this must be fully disclosed and agreed to by your site supervisor and your campus supervisor. This includes retaining copies of records belonging to the site. Violations of this policy may have significant legal and ethical consequences and may put the completion of your practicum at risk.
- All written materials from your internship setting (typically copies of case notes and treatment plans) should be returned to the files of your internship site after being reviewed by the faculty supervisor/instructor and returned to you. If they are not returned to the files of your internship site, they are to be destroyed. Under no circumstances are any of these site-based materials to remain in your personal possession.

Additionally, we will respect the confidentiality of classmates by maintaining privacy of any disclosures shared within our class (supervision) time. This information should not be shared outside of the classroom environment without permission.

### Emergency Procedures

Any emergencies at your practicum site should be handled according to their policies and with the guidance of your site supervisor. You must report any emergencies and departures from standard procedures to me ASAP (within 24 hours that the incident occurred) via email that does not contain identifying client information or by calling my office at 919-530-7584.

### Emails

By and large, I will respond to emails within 24 hours during the school week and within 48 hours on the weekends. Emails with questions about assignments due that week should be sent to me at least 48 hours prior to class.

### Respect

- Students are expected to assist in creating and maintaining an environment that is conducive to learning. All members of the learning community will demonstrate such respect by refraining from distracting, discourteous, or harmful behavior.
- Cell phones must be turned off (unless used for group supervision via Zoom) and stowed prior to the start of class. If you are expecting an emergency call, please advise the instructor prior to class. Otherwise I will begin to deduct participation points to discourage distractions and the use of unpermitted electronics. Please have all cameras/screens on during group and triadic supervision.
- Students are expected to practice classroom confidentiality: in other words, whatever is discussed in the classroom is expected to remain in the classroom. Failure to practice classroom confidentiality may result in failure or dismissal from the course.
- Emotional safety is paramount in a class of this nature. Disrespecting another's racial, religious, sexual identity; attacking another's point of view; etc. will not be tolerated.

### 7<sup>th</sup> Edition APA Style New Changes

<https://www.scribbr.com/apa-style/apa-seventh-edition-changes/>

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## VII. UNIVERSITY POLICIES

### Academic Honesty Policy

North Carolina Central University views academic honesty as a critical value protecting the transmission of knowledge. Academic dishonesty is a serious violation and includes providing/receiving unauthorized assistance with papers, projects, and exams; presenting, as one's own, another's words/ideas without acknowledgement; presenting the same papers/projects for credit in two classes without explicit professor permission; and using undocumented internet information. Academic dishonesty will result in a grade of "F" in the course.

### Statement of Inclusion/Non-Discrimination

North Carolina Central University is committed to the principles of affirmative action and non-discrimination. The University welcomes diversity in its student body, its staff, its faculty, and its administration. The University admits, hires, evaluates, promotes, and rewards on the basis of the needs and relevant performance criteria without regard to race, color, national origin, ethnicity, sex, sexual orientation, gender identity, gender expression, age, disability, genetic information, veteran's status, or religion. It actively promotes diversity and respectfulness of each individual.

### Student Accessibility Services

Students with disabilities (physical, learning, psychological, chronic or temporary medical conditions, etc.) who would like to request reasonable accommodations and services under the Americans with Disabilities Act must register with the Office of Student Accessibility Services (SAS) in Suite 120 in the Student Services Building. Students who are new to SAS or who are requesting new accommodations should contact SAS at (919) 530-6325 or [SAS@nccu.edu](mailto:SAS@nccu.edu) to discuss the programs and services offered by SAS. Students who are already registered with SAS and who would like to maintain their accommodations must renew previously granted accommodations by visiting the SAS website at [www.nccu.edu/SAS](http://www.nccu.edu/SAS) and logging into **Eagle Accommodate**. Students are expected to renew previously granted accommodations at the beginning of each semester, preferably during the first two (2) weeks of class. Reasonable accommodations can be requested at any time throughout the semester; however, they will not be effective retroactively. Students are strongly encouraged to contact their professors to discuss the testing and academic accommodations that they anticipate needing for each class.

Students identifying as pregnant or other pregnancy-related conditions who would like to request reasonable accommodations and services under Title IX must register with the Office of Student Accessibility Services.

### Confidentiality and Mandatory Reporting

All forms of discrimination based on sex, including sexual misconduct, sexual assault, dating violence, domestic violence, and stalking offenses, are prohibited under NCCU's Sexual Misconduct Policy (POL 01.04.4). NCCU faculty and instructors are considered to be **responsible employees** and are required to report information regarding sexual misconduct to the University's Title IX Coordinator. The Sexual Misconduct Policy can be accessed through NCCU's Policies, Rules and Regulations website at [www.nccu.edu/policies/retrieve.cfm?id=450](http://www.nccu.edu/policies/retrieve.cfm?id=450). Any individual may report a violation of the Sexual Misconduct Policy (including a third-party or anonymous report) by contacting the Title IX Coordinator at (919) 530-7944 or [TitleIX@nccu.edu](mailto:TitleIX@nccu.edu), or submitting the online form through [https://cm.maxient.com/reportingform.php?NCCentralUniv&layout\\_id=15](https://cm.maxient.com/reportingform.php?NCCentralUniv&layout_id=15).

### Other Campus Programs, Services, Activities, and Resources

Other campus resources to support NCCU students include:

- **Student Advocacy Coordinator.** The Student Advocacy Coordinator is available to assist students in navigating unexpected life events (e.g. short-term illness/injury, loss of a loved one, personal crises) and guide them to the appropriate University or community resources. Students may also receive assistance with resolving some emergency financial concerns; understanding NCCU policies, rules and regulations; or general problem-solving strategies. Contact Information: Student Services Building, Suite 236, (919) 530-7492, [studentadvocacy@nccu.edu](mailto:studentadvocacy@nccu.edu).

- *Counseling Center.* The NCCU Counseling Center is staffed by licensed psychologists and mental health professionals who provide individual and group counseling, crisis intervention, substance abuse prevention and intervention, anger management, and other services. The Counseling Center also provides confidential resources for students reporting a violation of NCCU's Sexual Misconduct Policy. Contact Information: Student Health Building, 2<sup>nd</sup> Floor, (919) 530-7646, [counseling@nccu.edu](mailto:counseling@nccu.edu).
- *University Police Department.* The University Police Department ensures that students, faculty and staff have a safe and secure environment in which they can live, learn, and work. The Department provides a full range of police services, including investigating all crimes committed in and around its jurisdiction, making arrests, providing crime prevention/community programs, enforcing parking regulations and traffic laws, and maintaining crowd control for campus special events. Contact Information: 2010 Fayetteville Street, (919) 530-6106, [nccupdinfo@nccu.edu](mailto:nccupdinfo@nccu.edu).

COVID-19 Health and Safety Requirement for Wearing a Face Mask or Other Face Covering in the Classroom or Other Instructional Setting:

To create and preserve a classroom atmosphere, whether in-person or online, that optimizes teaching and learning, all participants share a responsibility in creating a civil and non-disruptive forum. At all times, students are expected to continuously conduct themselves in a manner that does not disrupt teaching or learning. Your responsibilities as a member of the North Carolina Central University community are outlined in the NCCU Student Code of Conduct (Code). The Code outlines disciplinary procedures, behaviors that are subject to disciplinary action, hearing procedures and the consequences that result from violating the Code.

In addition to community standards to which all students are accountable, the Code outlines the requirement to abide by all other rules, regulations, policies, procedures and guidelines issued by the institution. In consideration of the University's commitment to maintain healthy and safe learning environments during the COVID-19 pandemic, the University has issued the Operations, Recovery and Continuity plan. The plan highlights and details the University's preparations to safely open for the Fall 2020 semester and includes behavioral standards for in-class instruction, such as physical distancing, use of face coverings, and hand hygiene. However, in light of the ever-changing nature of the COVID-19 pandemic, the plan is subject to change.

**Please be advised that face coverings are required while on campus and during in-person instruction as per NCCU's guidelines, and the State of North Carolina's Executive Order 147. The few exceptions to this requirement can be found in the Operations, Recovery and Continuity plan.**

Any action by a student that interferes with the education of another student or interferes with the operations of the University in carrying out its responsibility to provide a safe and conducive educational environment will be considered a violation of the NCCU Student Code of Conduct.

## II. COURSE COMPONENTS AND ASSIGNMENTS

*\*See the course schedule for due dates*

1. **PARTICIPATION** includes attendance and quality of engagement for the below activities.
  - a. **COUNSELING EXPERIENCE** In order to successfully complete the course, you must practice counseling for the designated number of hours. A total of one hundred (100) hours of counseling experience (indirect and direct hours) at a site (CACREP 3. F). At least forty (40) clock hours of your time must be spent in direct face-to-face service with your clients (CACREP 3.G). The remaining sixty hours can be obtained through indirect service, including but not limited to preparing for sessions, writing case notes, attending meetings at the site, case consultations, observing sessions, and scheduling appointments.
  - b. **SITE SUPERVISION** You are expected to meet with your site supervisor regularly. Your site supervisor will prepare formative and summative evaluations of your work. Please request evaluations early so they may be scheduled/prepared in advance of the due dates. Site supervisors may complete the printed copy of the evaluation or the online version (when it is available) at [www.nccucounseling.com/supervisors/](http://www.nccucounseling.com/supervisors/). The faculty supervisor will use the site supervisor's final evaluation as an element of the overall final evaluation by the faculty supervisor.
  - c. **GROUP UNIVERSITY SUPERVISION MEETINGS** Students must meet weekly for at least one and one half (1.5) hours with your university supervisor for group supervision (CACREP 3.I). This meeting is held online via Zoom from 6:00-7:30pm on Tuesdays (see schedule below). During these meetings you will discuss your practicum site progress, class readings, and present audio recordings for group review. You must complete the assigned readings and be prepared to discuss them at our group meetings. *\*Missed meetings can result in failure of the course*
  - d. **TRIADIC UNIVERSITY SUPERVISION MEETINGS** Students must meet weekly for at least one hour of triadic supervision (CACREP 3.H). This meeting time will be arranged leading up to the first week of classes and will take place using Zoom. During these meetings, you will discuss client cases in more detail (guided by your session review forms), listen to audio recordings, and receive personalized supervision. *\*Missed meetings can result in failure of the course. Time: 5-6 or 7:30-8:30 pm*
2. **DOCUMENTATION AND RECORDINGS**
  - a. **HOUR LOG** You must maintain a record of hours at your field site using the electronic form provided by the instructor. You will bring this form to each triadic supervision session to +verify your attendance and progress toward required hours at your site. A completed hour log signed by your site supervisor must be uploaded to Blackboard by the last day of the MOA. It is your responsibility to keep your hour log up to date and alert the instructor of any barriers to obtaining the required hours at your site.
    - Students must have completed hour logs available weekly during triadic.
    - Final hours logs must be uploaded to Blackboard by end of MOA.
  - b. **CONSENT TO RECORD** You must request permission to record all direct client care. Although there is no assigned point value in this course, failure to request consent to record direct client care can result in failure of the course because it is an ethical behavior. You must solicit and maintain documentation for each client's (or their parent/guardian's) consent or refusal of consent to recording sessions. Students are expected to consult with their site supervisor about recording policies at their field site. For sites who do not have an established recording policy or consent form, students may utilize the Permission to Record form prepared by the NCCU Counselor Education Program. Signed recording consent (or refusal) forms are to be stored securely at your field site.

- c. **SESSION REVIEW FORMS AND RECORDINGS** In preparation for triadic supervision, you will submit a minimum of 6 tape review forms with their corresponding tape throughout the semester in which you critique and evaluate a counseling session. Use the form in Appendix A. Due dates for these forms will be discussed in triadic. You are required to upload this completed form and the corresponding recording to your Google Drive folder at least 24 hours prior to your scheduled time for triadic. Do not upload your recording to Blackboard. In triadic we will listen to a 10-15 minute segment of the tape you have selected and reviewed, to analyze collectively. You are required to have already listened to the entire tape on your own and analyzed it in great detail and bring your form completed and ready to discuss in triadic. Please be prepared to take notes on feedback provided to you in triadic on your tapes.
- d. **RECORDINGS** Please record all client sessions in which the client has provided their consent to be recorded. It is important to capture as much of your work on tape as possible because this will allow you to review your work regularly and to seek supervision with “raw data” to consult. Exceptions may include spontaneous interactions or crises where it might disrupt the flow of the meeting to begin recording. **Upload all recordings to the shared Google Drive folder within 24 hours of making the recording and delete the file from your personal device.** Note that as your university supervisor, I might request additional recordings in excess of those submitted for triadic.

### 3. PROJECTS AND REFLECTIONS

- a. **JOURNAL REFLECTIONS WITH PROMPTS:**  
Students will respond to weekly journal prompts using google drive, a collaborative document allowing the instructor to comment and provide feedback. Weekly prompts will be developed based on The Supervision House (handout available in blackboard). **DUE WEEKLY** (Sunday at midnight) These reflections will start week 2 of the course.
- b. **CASE PRESENTATION** Each student will present at least one 15-minute tape for class critique in group supervision. You will also submit a write-up of contextual information of the case, apply a theory (of your choice) to the client, and develop a plan for what you might do with this client in the future. Appendix B contains the complete outline for you to follow. The case write-up and recording is due in Blackboard 48 hours before your scheduled presentation time. As always, be sure to document your client’s consent to be taped and have this stored at your site. You must base this presentation on a tape that you have not submitted for review in triadic.
- c. **COUNSELING CASE NOTES** Submit two thorough case notes (de-identified and consistent with confidentiality standards) in the formats included in Appendix C (SOAP and DART) and described in your week 3 reading. Use two different sessions, with the same or two different clients. After writing the notes, respond to each reflection question with 3-5 sentences. Upload a single Word document with your two case notes and responses to the reflection questions. Due date is reflected in the course schedule.
- d. **BRIDGING RESEARCH AND PRACTICE** Applying research in counseling improves the services we provide to clients. For this assignment you are required to locate and read one scholarly journal article related to a client population, presenting concern you have encountered, or a relevant counseling intervention. To find articles, use one of the research databases available through the NCCU Library (<http://web.nccu.edu/shepardlibrary/>). I recommend using PSYCINFO or Proquest Central. You will then develop a 1-page handout with (a) key takeaways from the article (just the highlights!) and (b) a brief description of how you incorporated this into your counseling. You will upload this handout to the designated Blackboard discussion board by the due date. You are then required to read through your peers’ handouts on Blackboard, making notes about the insights that are relevant to your work for discussion in class. Due dates are reflected in the course schedule.

#### 4. EVALUATIONS

- a. **MIDTERM EVALUATION** This evaluation is to be completed by your site supervisor and submitted at the midterm of the semester. The form is located on Blackboard (Content tab, Forms folder). Points are determined by on time submission as well as content of the evaluation.
- b. **FINAL EVALUATION** Similar to the midterm evaluation, this form is to be completed by your site supervisor and submitted at the end of the semester. You can find this form on Blackboard as well (Content tab, Forms folder). Points determined by on time submission as well as content of the evaluation.
- c. **EVALUATION** This evaluation completed by the university supervisor will also contribute to your overall assessment of skills, disposition, strengths, and areas for growth. The form used will be the same as your final evaluation by your site supervisor. **Note:** Significant issues relating to professional disposition can result in failure of the course. These will be brought to your attention in a timely manner in order to allow for prompt reflection and correction.

#### VIII. COURSE EVALUATION

Course Component	Assignment	Due Date	Points
1.Participation	Attendance at site and supervision sessions	Ongoing	75
	Quality of engagement (e.g., contributing to discussions, completing readings, offering feedback, journals)	Ongoing	75
2. Paperwork and Recordings	Hour log	April 27 <sup>th</sup>	65
	Session review forms + recording (6 x 10 points each)	Ongoing	60
3. Projects and reflections	Upload MOA & liability	Jan. 13 <sup>th</sup>	-
	Disclosure Statement	Jan 20 <sup>th</sup>	-
	Goal Statement	Jan 20 <sup>th</sup>	25
	Bridging Research and Practice	Apr. 7 <sup>th</sup>	25
	Case Presentation + recording (not recycled from triadic)	Ongoing	125
	Counseling Case Notes (one DART and one SOAP)	Feb. 24 <sup>th</sup>	25
	Final Goals Reflection	Apr. 21 <sup>st</sup>	25
4.Evaluations	Midterm Evaluation, site supervisor	Mar. 3 <sup>rd</sup>	50
	Final Evaluation, site supervisor	Apr. 21 <sup>st</sup>	50
	Evaluation (CSDAT)	Ongoing	100
	<b>TOTAL</b>		

#### Grading Scale:

<b>A</b>	630 - 700
<b>B</b>	560 - 629
<b>C</b>	490 - 559
<b>F</b>	< 490

**No grade below “C” will be accepted toward a graduate degree. This includes C- grades**

#### Course Policies

All assignments and exams must be completed and uploaded Canva on time in order to receive a passing grade in the course. Late assignments will not be accepted. Taskstream assignments should be edited and uploaded after grading.

Completed assignments must be submitted no later than the designate time. Any assignment turned in after the designated time is considered late.

It is recognized that many of our students have families, work, and take classes. While we understand that conflicting demands on your time will occur, our first priority is to assure that you leave this program with the knowledge and skills required of a graduate level counselor. Your future clients have a right to service from a fully qualified counselor. As a professional you will develop networks of resources to assist you in providing quality services to your clients. While a student, begin the networking experience by developing peer groups, study groups or other supports with your counseling colleagues. To assist in your professional development course expectations, include; course work/assignments will be submitted with proper grammar, typed, and of professional quality meeting APA (7<sup>th</sup> edition) writing standards. To contribute to a learning environment classroom conduct will include: arriving on time, being attentive, and being respectful of the instructor and fellow students.

### **Dispositions and Participation in Class**

As a part of your attendance and participation evaluation, students are graded regarding the following criteria:

- 1) Demonstration of attitudes, behaviors, and dispositions consistent with appropriate responses to critical feedback from the instructor, appropriate interactions and relationships with other students, and adherence to the ACA Code of Ethics.
  - 2) Demonstration of dispositions consistent with an inclusive, multicultural, and ethical counseling role in promoting well-being, healthy relationships, academic success, and career mastery
  - 3) Demonstration of effective leadership skills;
  - 4) Active engagement in class activities and participate as a group member; and
  - 5) Contributions to class discussion displaying critical and creative thinking skills
- (\*\*See the most recent version of the ACA code of ethics and the NCCU Counseling Student Handbook for more on Expected Student Dispositions and Behaviors.)

As your instructor, I do not foresee there being any concerns about professional behaviors; each of you have demonstrated these behaviors, as evidenced by acceptance into the program. If there is a reason for me to have any concern about a student's dispositions and there is a potential for the student to receive a less than ideal evaluation in this area, I will be in contact with that student immediately to address the concern.

### **Key Performance Indicators: Counselor Education Program Assessment Plan**

As part of the overall assessment plan for the Counselor Education program, designated courses have specific Key Performance Indicators (KPIs) that are connected to accreditation standards. Practicum has 6 KPIs which are listed below. The assignment that measures each standard is listed beside it. The instructor will record the final grade for each assignment in Taskstream which is a portal for recording grades. If the student does not meet the grade standard which will be clearly communicated when the assignment is introduced, the student will be asked to repeat the assignment.

KPI 1: Students will understand the role and professional identity as a counselor and have knowledge of the ethical codes to which counselors adhere: *CSDAT*

KPI 2: Students will demonstrate ethical practice and ethical decision-making in courses and in counseling practice. *CSDAT*

KPI 3: Students will demonstrate knowledge of theories and models of multicultural counseling including Multicultural and Social Justice Counseling Competencies: *Case Presentation*

KPI 4: Students will understand group counseling methods, including group counselor orientations and behaviors, appropriate selection criteria and methods, and methods of evaluation of effectiveness.  
*CSDAT*

KPI 5: Students will understand the importance of evidence-based practice and critique research to inform counseling practice. *Building Research to Practice assignment*

KPI 6: Students will understand psychopathology as well as principles, models, and documentation formats of biopsychosocial case conceptualization and treatment planning. *Case Presentation*

### Course Schedule

Date	Format	Focus / Readings and Assignments
<p><b>Week 1</b> January 12-16</p>	<p><b>Group Supervision</b> Tuesday 6-7:30pm</p>	<p>Getting started                      Introduction                      Purpose of supervision                      Review of syllabus and sign ups                      Discuss learning goals                      Submit your goal statement                      Review Counseling for Safety slide deck                      Review Scott PDS                      Submit signed copy of Intern PDS</p> <p>Upload your MOA and Liability Insurance</p> <p><b>Readings:</b></p> <ul style="list-style-type: none"> <li>• (skim) ACA Code of Ethics</li> </ul> <p>Verify that MOA and Liability Insurance are completed</p> <p><b>Readings due:</b> ACA Code of Ethics</p>
<p><b>Week 2</b> January 19-23</p>	<p><b>Group</b> Tuesday 6-7:30pm</p>	<p><b>Readings due:</b></p> <ul style="list-style-type: none"> <li>• McGlothlin, 2008 (Suicide Assessment)</li> <li>• Bray, 2021 (Crisis Counseling)</li> <li>• Safety Plan</li> </ul> <p><b>Journal reflection 1:</b> Goals</p>
	<p><b>Triadic</b> (as scheduled)</p>	<p>Professional Disclosure Statement</p>
<p><b>Week 3</b> January 26 - 30</p>	<p><b>Group Supervision</b> Tuesday 6-7:30pm</p>	<p><b>Readings due:</b></p> <ul style="list-style-type: none"> <li>• Zhang &amp; Parsons, 2016 (Case notes)</li> </ul> <p>Cognitive Distortions and the Beginning Counselor</p> <p><b>Journal reflection 2:</b> External: Factors Shaping you as a Counselor</p>
	<p><b>Triadic</b> (as scheduled)</p>	

<b>Week 4</b> February 2-February 6	<b>Group</b> Tuesday 6 -7:30pm	<b>Readings due:</b> <ul style="list-style-type: none"> <li>• Day-Vines et al., 2020 (Broaching)</li> <li>• Baynes &amp; Branco, 2018 (Broaching)</li> <li>• Ratts, et.al., 2016 (MSJCCs)</li> </ul> <b>Journal reflection 3:</b> Foundation (Theory)
	<b>Triadic</b> (as scheduled)	
<b>Week 5</b> February 9-13	<b>Group Supervision</b> Tuesday 6-7:30pm	<b>Listen to:</b> <ul style="list-style-type: none"> <li>• <a href="#">Podcast episode from <i>The Thoughtful Counselor</i> titled "Deliberate Practice – Cultivating Clinical Excellence with Tony Rousmaniere"</a></li> </ul> <b>Journal Reflection 4:</b> Family Room (Building Rapport with clients)
	<b>Triadic</b> (as scheduled)	
<b>Week 6</b> February 16-20	<b>Group Supervision</b> Tuesday 5-6:30pm	<b>Readings due:</b> <ul style="list-style-type: none"> <li>• McNichols, et al., 2016 (goal setting)</li> <li>• Gehart Ch. 3 (treatment planning)</li> </ul> <b>Journal Reflection 5:</b> Bedroom (Your sleepy skills/skills that are challenging for you.)
	<b>Triadic</b> (as scheduled)	
<b>Week 7</b> February 23-27	<b>Group Supervision</b> Tuesday 6-7:30pm  No Class – Please read the article and complete your assignment.	<b>Reading due:</b> <ul style="list-style-type: none"> <li>• Sperry and Sperry, 2020 (Case conceptualization)</li> </ul> <b>Due 2/24:</b> Counseling Case Note Assignment  <b>Journal Reflection 6:</b> Home Office (Staying organized)
	<b>Triadic - None</b>	

<b>Week 8</b> March 2- March 7	<b>Group Supervision</b> Tuesday 6-7:30pm	<b>Listen to:</b> <ul style="list-style-type: none"> <li>Podcast episode from <i>The Thoughtful Counselor</i> titled "<a href="#">Common Factors, Feedback, and How to Become a Better Therapist: A Conversation with Barry Duncan</a>"</li> </ul> <b>Due 3/3:</b> Midterm evaluation submitted via Canva  <b>Case Presentation(s) 1</b>  <b>Journal Reflection 7:</b> Chimney (How do you blow off steam?)
	Triadic (as scheduled)	
<b>Spring Break</b> March 7-14	No Class	
<b>Week 9</b> March 16-20	<b>Group</b> Tuesday 6-7:30pm	<b>Readings due:</b> <ul style="list-style-type: none"> <li>Hutchinson, 2007 (Termination)</li> </ul> <b>Case Presentation(s) 2</b>  <b>Journal Reflection 8:</b> Home First Aid Kit (Crisis plan)
	Triadic (as scheduled)	
<b>Week 10</b> March 23 - 27	<b>Group Supervision</b> Tuesday 6-7:30pm	<b>Readings due:</b> <ul style="list-style-type: none"> <li>Gladding, 1994 (Group work)</li> </ul> <b>Case Presentation(s)-3</b>  <b>Journal Reflection 9:</b> Closet Door (Insecurities/Vulnerabilities)
	Triadic (as scheduled)	
<b>Week 11</b> March 30- April 5	<b>Group Supervision</b> Tuesday 6 -7:30pm	<b>Listen to:</b> <ul style="list-style-type: none"> <li>Podcast episode from <i>Unlocking Us</i> titled "<a href="#">Trauma, Resilience, and Healing</a>" with Oprah Winfrey and Dr. Bruce Perry</li> </ul> <b>Journal Reflection 10:</b> Playroom (Creative Hands on strategies)
	Triadic (as scheduled)	

<b>Week 12</b> April 6-11	<b>Group Supervision</b> Tuesday 6-7:30pm	<b>Readings due:</b> <ul style="list-style-type: none"> <li>Lawson &amp; Myers, 2011 (Wellness and burnout)</li> </ul> <b>Due 4/6:</b> <ul style="list-style-type: none"> <li>Bridging Research and Practice Handout uploaded to Blackboard and present/discuss in class</li> </ul> <b>Journal Reflection 11:</b> Exercise Room (Strengths)
	<b>Triadic</b> (as scheduled)	
<b>Week 13</b> April 13-18	<b>Group Supervision</b> Tuesday 6-7:30pm	<b>Listen to:</b> <ul style="list-style-type: none"> <li>Podcast episode from <i>The Thoughtful Counselor</i> titled <a href="#">"Trusting the Natural World – During the COVID-19 Pandemic and Beyond with Katie Asmus"</a></li> </ul> <b>Journal Reflection 12:</b> Roof (Support/Resources)
	<b>Triadic</b> (as scheduled)	
<b>Week 14</b> April 20-25	<b>Group Supervision</b> Tuesday 6-7:30pm	<b>Listen to:</b> <ul style="list-style-type: none"> <li>Podcast episode from <i>The Thoughtful Counselor</i> titled <a href="#">"Decolonizing Counseling Practice with Brandee Appling"</a></li> </ul> <b>Due 4/21:</b> <ul style="list-style-type: none"> <li>Final Site Supervisor Evaluation</li> <li>Final Goal reflection</li> </ul> <b>Journal Reflection 13:</b> Car: (Theory/ies driving you towards internship)
	<b>Triadic</b> (as scheduled)	
<b>Week 15</b> April 27	<b>No group or triadic meetings</b>  <b>Individual conference with instructor to be scheduled</b>	<b>MOA ends 4/28 (last day to be at your site)</b>  <b>Due 4/28:</b> <ul style="list-style-type: none"> <li>Final hour log</li> </ul>

*\*\*Schedule is tentative and subject to change.\*\**

*\*Schedule Tentative to Change\**



background/demographic/cultural (worldview) information	1 2 3 4 5 NA	
26) Used conceptualization as basis for planning session, choosing culturally sensitive interventions, collaboratively setting goals, and evaluating client progress	1 2 3 4 5 NA	
27) Considered environmental factors (e.g., stressors and resources)	1 2 3 4 5 NA	
28) Identified patterns and themes	1 2 3 4 5 NA	
29) Demonstrated effective collaborative goal setting with clients	1 2 3 4 5 NA	
30) Facilitated movement towards goals	1 2 3 4 5 NA	
31) Used and matched a variety of appropriate and intentional counseling approaches/strategies/interventions	1 2 3 4 5 NA	
32) Conducted comprehensive crisis assessments/intervention as appropriate	1 2 3 4 5 NA	
33) Competent analysis and resolution of ethical issues/dilemmas	1 2 3 4 5 NA	

**Counselor-in-Training Will Complete**

After listening to your audio-recorded session, type out your response to the following questions:

1. What do you feel good about? (Please talk about in general with the session as well as addressing the more advanced skills)
2. What would you like to change? (Please talk about in general with the session as well as addressing the more advanced skills)
3. How do you perceive the client responding to you? What evidence can you point to?
4. What were you thinking and feeling as the counselor? (Both in regard to your performance and in relation to how you felt about the client)
5. Give a brief explanation of the techniques/skills you displayed in this session and your intentionality behind them.
6. Based on the results of this session, what could be the therapeutic goals and objectives for your next session with this client?
7. Identify your strengths and weaknesses in this session.
8. Any additional thoughts/comments you would like to make about YOU as the counselor, not your client.

Student’s evaluation of self: (circle one number)

Ineffective											Very Effective									
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	

Please explain your number choice.

## **Appendix B: Case Presentation**

### Guidelines for Case Presentations

In preparing for your presentation, you should select a client with whom you are having some difficulty. Prior to our meeting, you should organize information about your client and your experiences with them. Prepare a typed summary of the information outlined below to distribute to the group at the time of the presentation. You will then play a 15-20-minute clip of your choosing. Your introduction to the case (referring to your typed summary and addressing any peer questions) should last no more than 10 minutes. This leaves the majority of the time for feedback and comments from your peers and supervisor. Your case presentation should include the following information:

#### **1. Client Demographics**

- a. Age, gender, race/ethnic background, sexual orientation, immigration status, language, religious affiliation, disability, educational/academic/vocational status, physical appearance, interpersonal style, etc.

#### **2. Presenting Problem**

- a. Why is the client presenting for counseling? Why now? Is the presenting problem described by client the same as what you see as the presenting problem? How has the presenting problem developed/changed over time? How is it manifesting now?

#### **3. History of significant events**

- a. Medical and health history
- b. Social, interpersonal history
- c. Education, vocational history
- d. Family background
- e. Previous counseling experience
- f. Trauma experiences
- g. Any notable situational factors

#### **4. Conceptualization**

- a. Working hypotheses for DSM Diagnosis (if applicable)
  - i. Including previous client diagnoses
  - ii. Documented learning or physical disabilities
- b. Conceptualization of client
  - i. Apply a theory of your choice to describe your client's situation (in at least four sentences)
  - ii. Describe relevant cultural variables, their impact on client's strengths, access to resources, and beliefs/values/worldview. Discuss your match/mismatch with the client in terms of these cultural variables.
  - iii. Identify developmental stages/concerns of the client
  - iv. Assess client's level of overall wellness

#### **5. Course of Counseling**

- a. Initial goals, plan, treatment strategies
- b. Progress to present (including how many sessions you have had)
- c. What have you done that has worked? That has not worked?
- d. Relationship
  - i. How do you feel when with this client? What emotions, thoughts, impulses come up for you in working with this client?
  - ii. How do you think your client sees you? How do you think your client experiences you?
  - iii. What are your expectations of one another in the counseling process?
  - iv. Metaphor for relationship?

#### **6. Current difficulties, blocks, needs from group**

- a. What aspect of the clip would you like the group to focus on?
- b. Particular difficulties you are having with this case?

### Appendix C: Case Note Formats

#### SOAP Note

(Review Progress Notes Guideline)

Counselor \_\_\_\_\_ Session # \_\_\_\_\_ Date of Session \_\_\_\_\_

#### Brief Client Description:

Subjective (client's conceptualization of the problem/issues):

- a. In this section of the case note, provide a general description of the client's feelings, homework report, concerns, problems expressed, thoughts, and any other relevant information reported by the client during the counseling session. Examples of specific ways of phrasing such reports are:
  - *The client reported ...*
  - *The client stated...*
  - *The client expressed...*
  - *The client declared...*

Objective (counselor's observations of client behaviors during session):

- b. Objective Report: There are at least three types of information that you can report in this section of the case note: Client's objective reports (description of specific objective information reported by the client such as mood scale reports, test results, surveys, and anything that the client has objectively measured), clinician's empirical observations (any mental status information, adherence to treatment reports, strengths, assessment of progress towards goals/objectives, and interpersonal or physical findings relevant to treatment), and outside documented reports (mental health diagnostic reports, psychological reports, psychiatric reports, school reports, medical information and any other outside reports that would be relevant for treatment). When reporting empirical observations of the client's mood it is recommended to use the formula:
  - *The client appeared to be \_\_\_\_\_ as evidenced by \_\_\_\_\_*
  - *The client seemed to be \_\_\_\_\_ as reflected by \_\_\_\_\_*
  - *The client gave the impression to be \_\_\_\_\_ as indicated by \_\_\_\_\_*

Assessment (counselor's assessment of themes and patterns, application of theory):

- b. **Focus of the Session:** In this section of the case note, provide a brief description of the "working stage" of the counseling section. If clinically relevant, report on specific strategies for change, interventions, primary and secondary themes, activities, as well as goals and or objectives addressed (from the treatment plan). If possible, make sure to report on the client's response to any strategy used. When reporting on the focus of the session it is recommended to use the formula:
  - *The focus of the session was \_\_\_\_\_*
  - *The target for this session was \_\_\_\_\_*
  - *The focal point of this session was \_\_\_\_\_*
  - *The goal or objective of the session was \_\_\_\_\_*

Plans (for client and counselor in between sessions and in continuing sessions):

- a. Plan: In this section of the case note, provide a brief description of the next steps to follow in working with this client. Report on what you expect to be the focus of the next session, the next goal or objective to be addressed, the next topic to be covered, etc. A regular formula when reporting on this section is:

- *The plan is to continue working on* \_\_\_\_\_
- *The next step in treatment is to* \_\_\_\_\_
- *In the next session, the focus will be on* \_\_\_\_\_
- *The goal or objective for next session is to* \_\_\_\_\_
  - a. Homework/Practice: In this section of the case note, describe what the client has agreed to do in order to put in practice what has been worked on during the session. A formula for reporting on this section is:
    - *As a homework, client is to* \_\_\_\_\_
    - *HW: Client is to* \_\_\_\_\_
- *As a practice exercise, client will* \_\_\_\_\_

### DART Note

(Review Progress Notes Guideline)

Counselor \_\_\_\_\_ Session # \_\_\_\_\_ Date of Session \_\_\_\_\_

Brief Client Description:

Description (details of the client and client situation):

Assessment (counselor observations and conceptualization):

Response (how counselor intervened and how client was impacted):

Treatment (next steps, including “homework,” upcoming session date/time and plan, referrals, etc.):

### Reflection questions

1. Which note format did you prefer to use? Why?
2. Keeping case notes requires counselors to balance including important information without being overly specific or detailed. In essence, you are required to filter in the most salient information, report it in a concise and professional manner, while filtering out “fluff.” Give an example of how you grappled with which information to include in the above notes. Did you filter it in or out? How did you arrive at that decision?
3. Which theory(ies) did you rely on to write your case notes? Where are they visible within the note (e.g., terminology or interventions used)?

### Progress Notes Guidelines

2. Please make sure to complete all areas required and sign every case note with credentials if appropriate.
3. In the “**Type of Service**” section, make sure to indicate the appropriate recipient of services. The “**Other**” category is for you to indicate other modalities of contact with clients such as phone calls, letters, or any other forms of communication with clients approved by the clinical supervisor.
4. When writing your case notes, make sure to address as a minimum the following areas:
  - a. **Subjective Report:**
    -
  - b. **Focus of the Session:** In this section of the case note, provide a brief description of the “working stage” of the counseling section. If clinically relevant, report on specific strategies for change, interventions, primary and secondary themes, activities, as well as goals and or objectives addressed (from the treatment plan). If possible, make sure to report on the client’s response to any strategy used. When reporting on the focus of the session it is recommended to use the formula:
    - *The focus of the session was* \_\_\_\_\_

- *The target for this session was \_\_\_\_\_*
- *The focal point of this session was \_\_\_\_\_*
- *The goal or objective of the session was \_\_\_\_\_*

- As a counselor in training, you are expected to report systematically on every one of the areas identified in this progress note format (Subjective, objective, focus, plan & homework). This will help you develop a more structured approach in documenting the work that you do with your clients. You don't have to necessarily address all the components within each area but only those that are clinically relevant.
- When you want to correct something that you have written use the "legal method". Draw a line across the word or phrase and initial it (<sup>BP</sup>). Do not use "white-out" under any circumstance (See case note example).
- Write your case note as a continuous paragraph without leaving any spaces between phrases or after a period. If you have left any spaces between lines draw a horizontal or diagonal line (if more than one empty writing line) over the open writing space and initial it. (-----<sup>BP</sup>). This would be a legal protection for a clinical record so information cannot be added after the case note is complete.
- If a client does not show up for a session or cancels a session document it in the case notes. Also, make sure to document any phone calls and any other attempts to reach your client. No case note should be left without a note or the corresponding signatures, particularly if the client has missed the session. When you call, remember not to leave any explicit messages unless the client has given consent to do so.

Progress Note

Dr. Maureen Duffy Family Enrichment Center

Date:	Time:	Session #:
Type of Service: <input type="checkbox"/> Individual <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Group <input type="checkbox"/> Other:		
Subjective Report (By Client)		
Objective Report (Client's objective reports, Clinician's empirical observations, test results, etc.)		
Focus of the Session (Intervention, Strategy for change, theme, activity, goal or objective addressed, etc.)		

Plan (Next steps)	
Homework/ Practice	
Signatures:	
_____	_____
Counselor-in-Training	Faculty Course Supervisor

Appendix D

**BIOPSYCHOSOCIAL ASSESSMENT**

Client Name:

Date of Assessment:

**I. PROBLEM IDENTIFICATION**

**PRESENTING PROBLEM** (Reason for Referral, reported symptoms, affected areas of functioning, strengths, coping strategies):

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**PRECIPITATING EVENTS** (Frequency, Intensity, and Duration):

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**TREATMENT HISTORY** (Previous Counseling/Consultations/Referrals for this Problem):

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**II. FAMILY/SOCIAL/CHILDHOOD HISTORY**

**FAMILY INFORMATION** (Family of Origin, Parents, Birth Order, Siblings, Children, Childhood Family Experience):

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**HOUSING AND FINANCIAL INFORMATION** (Current Living Situation, financial situation):

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**SUPPORT SYSTEMS:** (Friends, Pets, Clubs, AA/NA, Past/Present Romantic Relationships, etc.):

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**OCCUPATIONAL INFORMATION** (Vocation/Profession, employment history):

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**EDUCATIONAL INFORMATION** (Last grade completed, area of educational focus, current and future educational plans):

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**MULTICULTURAL INFORMATION:** (Race, ethnicity, country of origin, religious or spiritual association, main values, level of acculturation, socio/racial identity development level, etc.)

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**DEVELOPMENTAL/CHILDHOOD HISTORY** (Issues during pregnancy, Birth, Infancy, Childhood):

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**III. TRAUMA HISTORY:**

History of Trauma:     YES     NO

<input type="checkbox"/> Trauma Type	Explain	Details of Report (if minor, elder, or vulnerable person, date of report, specify which authorities it was reported to, outcome of report)
<input type="checkbox"/> Emotional Abuse		
<input type="checkbox"/> Physical Abuse		
<input type="checkbox"/> Physical Neglect		
<input type="checkbox"/> Sexual Abuse/Molestation		
<input type="checkbox"/> Rape/Sexual Assault		
<input type="checkbox"/> Domestic/Intimate Partner Violence		
<input type="checkbox"/> Elder Abuse		
<input type="checkbox"/> Community Violence		
<input type="checkbox"/> Family Trauma		

**IV. MEDICAL/PHYSICAL/PSYCHIATRIC HISTORY:**

**DATE OF LAST PHYSICAL EXAM:**

**PAST/CURRENT MEDICAL ISSUES** (significant injuries, diseases/illnesses, medical hospitalizations, surgeries, allergies, sleep problems, nutritional problems):

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**CURRENT MEDICATIONS:**

Medication	For Whom Was It Prescribed For:	Prescribed By (Type of Doctor):	Reason for Taking Medication	Amount/Frequency	Duration	Side Effects
Homeopathic	<input type="checkbox"/> Self <input type="checkbox"/> Other (please describe):					
	<input type="checkbox"/> Self <input type="checkbox"/> Other (please describe):					
	<input type="checkbox"/> Self <input type="checkbox"/> Other (please describe):					
	<input type="checkbox"/> Self <input type="checkbox"/> Other (please describe):					
	<input type="checkbox"/> Self <input type="checkbox"/> Other (please describe):					
	<input type="checkbox"/> Self <input type="checkbox"/> Other (please describe):					

**HISTORY OF COUNSELING, PSYCHIATRIC, PSYCHOLOGICAL, and/or PSYCHOEDUCATIONAL EVALUATIONS, TREATMENT, OR PROBLEMS** (Self, Immediate / Extended Family, Diagnosis, Medications, Results of Evaluations/Testing Focus of Interventions, Areas of Success, Areas for Improvement, Outpatient, Inpatient, State Hospital, etc.)

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**V. SUBSTANCE USE/ADDICTIVE BEHAVIOR HISTORY**

**SUBSTANCE USE INFORMATION:**       YES       NO

Type	Use	Age Of First Use	Amount/Frequency	Method	Date/Age of Last Use
<input type="checkbox"/> Alcohol	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Marijuana or Hashish	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Cocaine	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Crack Cocaine	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Ecstasy,	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Hallucinogens (Mushrooms, acid)	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Prescription:	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Heroin	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Crystal Methamphetamine	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Methadone	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Caffeine	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Nicotine/Cigarettes	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Inhalants (e.g. glue, gas)	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Opiates	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Ketamine, GHB)	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				
<input type="checkbox"/> Other:	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A				

**ADDICTIVE BEHAVIOR INFORMATION:**       YES       NO

Type	Use	Age Of Onset	Amount/Frequency	Date/Age of Last Use
<input type="checkbox"/> Gambling	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A			
<input type="checkbox"/> Sexual	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A			
<input type="checkbox"/> Internet	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A			
<input type="checkbox"/> Food	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A			
<input type="checkbox"/> Shopping	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A			
<input type="checkbox"/> Other:	<input type="checkbox"/> Past <input type="checkbox"/> Present <input type="checkbox"/> N/A			

Current/Prior Treatment for Addictive or Substance Use/Abuse (residential, outpatient, MarchMan Act, Court Ordered, Support Groups):

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**VI. LEGAL HISTORY**

**LEGAL INFORMATION** (Arrest history, Convictions, Probation/Parole, Court Ordered treatment, Court Involvement, custody issues):

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**V. MENTAL STATUS EXAM**

General Observations	
Appearance	<input type="checkbox"/> Well-groomed <input type="checkbox"/> Unkempt <input type="checkbox"/> Disheveled <input type="checkbox"/> Malodorous
Build	<input type="checkbox"/> Average <input type="checkbox"/> Thin <input type="checkbox"/> Overweight <input type="checkbox"/> Obese
Attitude	<input type="checkbox"/> Average <input type="checkbox"/> Preoccupied <input type="checkbox"/> Hostile <input type="checkbox"/> Withdrawn <input type="checkbox"/> Guarded <input type="checkbox"/> Demanding
Eye Contact	<input type="checkbox"/> Average <input type="checkbox"/> Avoidant <input type="checkbox"/> Intense
Psychomotor Activity	<input type="checkbox"/> Normal <input type="checkbox"/> Agitation <input type="checkbox"/> Wringing of Hands <input type="checkbox"/> Pacing <input type="checkbox"/> Restlessness <input type="checkbox"/> Slow body Movements
Speech	<input type="checkbox"/> Clear <input type="checkbox"/> Slurred <input type="checkbox"/> Rapid <input type="checkbox"/> Pressured
Thought Content	
Delusions	<input type="checkbox"/> None Reported <input type="checkbox"/> Grandiose <input type="checkbox"/> Persecutory <input type="checkbox"/> Somatic <input type="checkbox"/> Religious <input type="checkbox"/> Paranoia <u>Describe:</u>
Other	<input type="checkbox"/> None Reported <input type="checkbox"/> Obsessions <input type="checkbox"/> Compulsions <input type="checkbox"/> Phobias <input type="checkbox"/> Poverty of Content <input type="checkbox"/> Anhedonia <input type="checkbox"/> Ideas of Reference <input type="checkbox"/> Thought Broadcasting <u>Describe:</u>
Suicidal	<input type="checkbox"/> None Reported <input type="checkbox"/> Ideation History <input type="checkbox"/> Previous Attempts <input type="checkbox"/> Current Ideation <input type="checkbox"/> Viable Plan <input type="checkbox"/> Available Means <u>Comments:</u>
Homicidal	<input type="checkbox"/> None Reported <input type="checkbox"/> Previous Intimidation <input type="checkbox"/> History of Violence <input type="checkbox"/> Current Intent <input type="checkbox"/> Viable Plan <input type="checkbox"/> Available Means <u>Comments:</u>
Self-Abuse	<input type="checkbox"/> None Reported <input type="checkbox"/> Self-mutilation (Cutting, burning, etc)
Perception	
Hallucinations	<input type="checkbox"/> None Reported <input type="checkbox"/> Auditory <input type="checkbox"/> Visual <input type="checkbox"/> Olfactory <input type="checkbox"/> Gustatory <input type="checkbox"/> Tactile <u>Describe:</u>



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Clinician's Name (Credentials/Title)	Clinician's Signature	Date
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Clinical Supervisor Name (Credentials/Title)	Clinical Supervisor Signature	Date
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**Appendix E**  
**Treatment Plan**

Dr. Maureen Duffy Family Enrichment Center  
**Treatment Plan**

<input type="checkbox"/> Initial Treatment Plan	<input type="checkbox"/> Updated Treatment Plan
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Date of Intake: \_\_\_\_\_

Date of Treatment Plan Creation: \_\_\_\_\_

Client Name: \_\_\_\_\_

Referral Source: \_\_\_\_\_

Reason for Referral: \_\_\_\_\_

Goal:	Dates for Goal	Objectives	Interventions
	Date Goal Created:		
	Projected Completion Date of Goal:		
	Actual Completion Date of Goal:		

Number of Recommended Sessions:  Frequency of Sessions:

*As part of our services to you today, the above recommendations have been made. Your signature indicates that you have participated in the development of this plan and understand the recommendations.*

\_\_\_\_\_  
 Client/Guardian

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Counselor-In-Training

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Faculty/Individual Course Supervisor

\_\_\_\_\_  
 Date