

APPENDIX E | THE ACCF PROFESSIONAL TOOLKIT

E.10 Session Notes: The Four-Field Structure

Supplemental resource from Beyond Wellness: The Adaptive Capacity Coaching Framework for Chronic Illness

Good session notes are not a summary of everything that happened. They are a precise record of what matters: how the client presented, what was addressed, whether anything requires follow-up, and what to carry into the next session. Five minutes is enough time to capture all of it, if you know what you are looking for.

Write immediately after the session ends, before the next client or task. The window closes fast. What feels vivid at 2:00 PM is a blur by 5:00.

The Four-Field Structure

Capacity observation. One sentence. How did the client present today (energy, cognition, emotional state)? This is observation, not assessment. “Client presented fatigued, slower to retrieve words than last session, disclosed a flare overnight.” That is enough.

What was covered. Two to three sentences. The session focus, any significant content, decisions or intentions made. Not a transcript. Not a narrative. The essential thread.

Scope or safety flags. Any content that approached a boundary, required a scope clarification, or triggered a safety concern. If none, write “none.” Do not leave this field blank. Blank creates ambiguity; “none” creates a record.

Next session. One sentence. What you will return to, or what you want to hold in mind before the client arrives.

What Notes Are Not For

Notes are not for processing your own reactions to the session. They are not a place to record your clinical hypotheses about the client's diagnosis or the causes of their symptoms. They are not a space for editorializing about the client's choices, readiness, or motivation. Write what happened and what was decided. Nothing more.

Notes may be subpoenaed. Write as if they will be read by someone who doesn't know you, your client, or the context. Factual and brief is both legally sound and practically sufficient.

A Note on Timing

If you are a coach with your own chronic illness, the post-session window is also a recovery window. The four-field structure was designed with this in mind. Four sentences. Five minutes. Then close the laptop.

If you find yourself writing at length after sessions, that is a signal worth examining. Over-documentation can be a form of the righting reflex: a way of staying in the problem after the session has ended. Brief notes protect your energy and keep the record clean.

The Test

Before you close your notes, ask: if I read this six months from now, would I know what happened and what matters? If yes, you are done.

Note template on next page.

Session Note Template

Session Information	
Notes	
Client Name	Date
Session #	
Session Length	☐ 30 min ☐ 45 min ☐ 60 min ☐ Other: _____
1. Capacity Observation	One sentence: energy, cognition, emotional state
How did the client present today?	
2. What Was Covered	Two to three sentences maximum
Session focus, content, decisions or intentions made	
3. Scope or Safety Flags If none, check "none": do not leave blank	
☐ None ☐ Scope clarification needed: _____ ☐ Safety concern: _____ ☐ Referral indicated: _____ ☐ Other: _____	
4. Next Session	One sentence
What to return to or hold in mind before the client arrives	
Time to complete ____ minutes (target: 5 minutes or less)	

These templates are provided as professional resources and may be photocopied for use in your coaching practice. Customize as needed to fit your specific context, client population, and local regulatory requirements. For the most current versions and additional resources, visit beyondwellnesscoach.com.