

Customizing the Session Note Helper 2.5™ Using Google Forms and Google Docs

[>>Watch The Video Tutorial Here<<](#)

One of the biggest “game changers” for therapists using [G-Suite](#) is its ability to integrate the functionality of the different apps. For example, using Google Forms and Google Docs to streamline various documentation processes.

In this tutorial, I’ll walk you through how to set up the “Session Note Helper 2.5™” that I developed to help me streamline my session note writing and documentation processes. This version of the Session Note Helper system is improved in that it is now fully HIPAA secure if you use the paid version of Google G-Suite which offers the BAA. ([More info on that here](#))

We do things pretty much the same...

Most of us tend to use a lot of the same phrasing and clinical language in our documentation. That is not to say that we use the same note every time (No cloning of notes! That’s just unethical and probably illegal!). But when working with clients we do tend to describe what happens in sessions pretty much the same way.

For example, if you have a client that is struggling with depression and anxiety, you will probably say something like this in your notes: *“The patient presents with symptoms of anxiety and depression...”* And you will do that with most anyone who comes in and presents with those symptoms.

It just makes sense that if you say it that way most every time, why should you have to type that out every single time? And there are lots of other ways we say things in our notes pretty much the same way each time.

So why not automate that process? The good news is that you can!

Session Note Helper™ Does This...

To me the solution I needed was to have an application that I could use a series of checkboxes to “checkoff”:

- 1.) what was going on with the client,

- 2.) any safety concerns,
- 3.) what I did with the client in the session, then
- 4.) plans for future sessions

THEN...

Have it produce a narrative document I could enter as an electronic record or print. The solution was to use Google Forms in conjunction with an add-on or plugin that creates a Google Doc from what was entered in the form.

All of this works together because of an App Script that was developed for The Practice of Therapy to specifically for the Session Note Helper. The App Script is preloaded in the Google Forms template that you purchased. *PROTECT YOUR ORIGINAL COPY* so you do not lose the App Script.

Initial Setup

Be sure to watch the ENTIRE setup video before starting to customize your Session Note Helper system.

[Watch the Video Quick Start Guide Here](#)

PLEASE NOTE: *You will need to have a Google/G-Suite account to use these tools. And in order to make the Session Note Helper System "HIPAA Compliant" you will need to use [the paid version of G-Suite](#). (**See additional notes below on HIPAA security*

You will need to **sign in** to your Google account in order to save these two documents. It is recommended that you use Google Chrome as your browser.

Get your copies of the 2 parts of Session Note Helper:

- 1.) Google Form- "*Master Copy of Session Note Helper 2.5*" (Google Form)
- 2.) Google Doc - "*Master Copy of Session Note Doc Template 2.5*"

If you have not purchased the templates, [you can do that here](#).

When you click on the links it will prompt you to make a **Copy** of the 2 different documents. It will automatically save these to your **Google Drive**.

Create a new folder in your Google Drive labeled **Session Notes** (or whatever you choose to call it). Move your copies into this new folder you want to use them in.. (You can do this by clicking on the **folder icon** next to the document title for *Google Forms* and *Google Docs*.)

Make back-up copies to use as your working copy of your master copy. Do this by opening the Google Form and clicking on the three dots **⋮** in the top right corner then **Make a copy**. For the Google Doc do this by clicking **File >> Make Copy**

Step Two:

Activate The Apps Script

The “Apps Script” is what converts the Google Form responses to a Google Doc.

1. Open the **Google Form**, click on **Add-ons** button (“**Puzzle Piece Symbol**”)
2. Click on **Session Note**
3. A pop-up will appear that says, “*Authorization Required- A script attached to this document needs your permission to run.*” Click **Continue**
4. The Google sign-in prompt will come up. Choose the Google account you want to use.
5. You will next need to give permission to access your Google account “*Session Note wants to access your Google Account*” **Click Allow**. (**See more below about what you are allowing.)
6. Next you will need to select the template; this is the “**Copy of Session Note Template**” **Google Doc**. Find it on the list (should be near the top) click on it and then click **Select**.
7. Next you will select your destination folder. Select the **Session Notes** folder you created earlier (or whichever folder you would like your documents saved into).
8. You will next be asked to *Enter File Name Format*. Leave this blank unless you would like to save it other than the client name and date.
9. Lastly, you can opt to save the document as a PDF file rather than a DOC file.. I would suggest you **click No** so that you can edit the finished document. (*You can always convert the document to a PDF later*).

Step Three

Start Using Your Session Note Helper™

Once you have completed the set up your Session Note Helper should be ready to use. On your working copy of your Google Doc, “**Copy of Session Note Template**”, you can change the header to reflect your practice information. (Note: be careful not to change any of the words that are in between the double symbols << >>.)

To start using the form you will need to “send” the Google Form to yourself. Click on the “**SEND**” button in the top right of your Google Form. Click on the **link icon** and copy the link. Paste the URL link into your browser.

Tip: Paste the URL to your desktop for easy access or save it as a bookmark in your browser

Do note, that the link is to the **response form** and is not in editing mode. To make any changes to the the form or template, you will need to make sure you are in the editing format. You can do so by double-clicking on the form in **Google Drive** or by clicking on the **Edit icon** in the top right of the response form. You will need to be logged into your Google account in order to do this.

Customizing Up Session Note Helper™ System In G-Suite

The beauty of this system is that you can set it up to create session notes in any format you wish. For example, SOAP Notes, DAP Notes, STEP Notes or any other format you chose to use.

If you have downloaded the Session Note Helper 2.5 Start-Up guide, you will have access to the templates below. [You can purchase the templates and start-up guide here.](#)

Customize Your Form

The Google Form is divided into sections with questions that correspond to the “markers” that on the Google Doc template. These markers are indicated by <<double brackets>>. The key to making sure the App Script works correctly is to be sure all of the “markers”; the wording <<between the arrow brackets>> match EXACTLY the questions on the Google Form.

So in the screen shot below, the **Name** question on the Google form needs to have a <<Name>> bracket on the Google Doc., etc.

Sample Note

Form description

Name

Short answer text

Date

Month, day, year

Start Time

Time

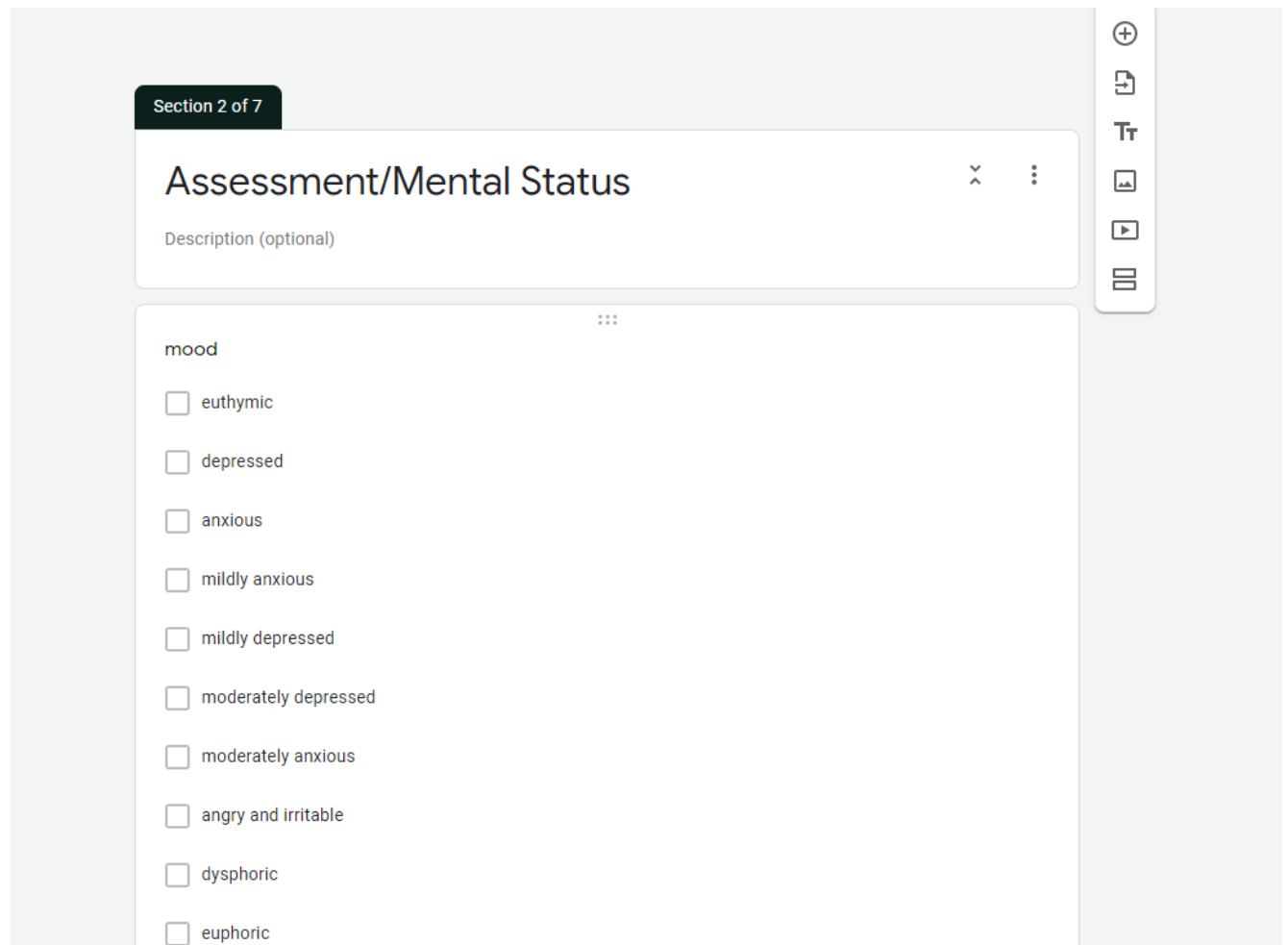
End Time

Time

Time

Required

Some of the questions on the form have a place to put in simply a text response (like the name, date, time, etc.) Other sections are multiple choice or check boxes, like below.



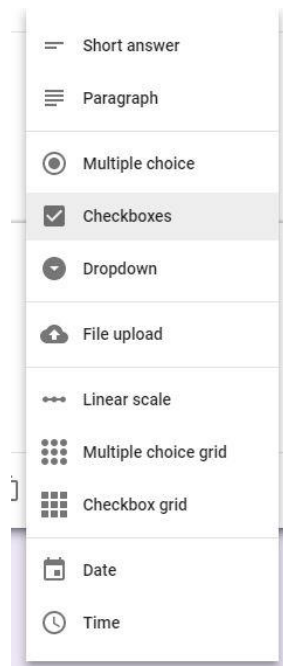
If you would like to add or delete individual checkbox or multiple-choice responses within a question, you can do this directly at the bottom of each section.

Hint: Checkbox responses allows the user to pick more than one response. Multiple-choice responses only allow a single response for each section.

If you would like to add new questions with their own unique responses, by clicking the add button to the right of each section.



You can change the question format using the **dropdown menu** to the right of the question:



Again if you add a new question in the Google Form, you must also have a corresponding “marker” in <<double brackets>> on the Google Doc. The Google Doc Template with corresponding markers looks like this:

Practice Name
Practice Address
Practice Phone
Practice Email

Patient Name: <<Name>>

Date of Session: <<Date>>

Session Start Time: <<Start Time>>

Session End Time: <<End Time>>

Also present for the session: <<Also present for the session>>

Session Note

Assessment/Mental Status: Patient's mood was <<mood>> with <<affect>>; <<orientation>>. Patient expresses having <<functioning>>.

Suicidal Thoughts/Ideations: <<suicidal thoughts>>. Patient <<suicide comments>>.

Presenting Issues: <<Patient/Couple>> <<Presents/Continues>> <<Issues1>> <<Issues2>>.

Focus of Session: Session focused on <<Process>> <<Patient/Couple>> <<Focus>> <<Issues3>>.

Interventions Attempted: Processed with the <<Patient/Couple>> <<Descriptor>> <<Issues4>>. Interventions included an emphasis on <<Intervention1>> and <<Intervention2>>. Discussed <<Skill>>. Other interventions included <<Other Interventions>>.

Focus of future sessions/plan: Continue with <<Plan1>>. <<Plan2>>.

Other Comments: <<Other comments>>

Once you have made all the changes, you will need to run the setup again to activate the App Script and have it identify all the markers. (see above in the set-up section). Then you can check to see if you have all the corresponding makers in place by clicking on **Add-ons** button ("**Puzzle Piece Symbol**") and then selecting **Check Template**.

Start Using Your Session Note Helper™

Once you have completed making sure all the information matches on your form and template you are ready to use it!

To start using the form you will need to “send” it to yourself. Click on the “**SEND**” button in the top right of your form. Click on the **link icon** and copy the link. Paste the URL link into your browser.

Tip: Paste the URL to your desktop for easy access or save it as a bookmark in your browser

Do note, that the link is to the **response form** and is not in editing mode. To make any changes to the the form or template, you will need to make sure you are in the editing format. You can do so by double-clicking on the form in **Google Drive** or by clicking on the **Edit icon** in the top right of the response form. You will need to be logged into your Google account in order to do this.

Note About HIPAA Concerns

If you are using [the paid version of G-Suite](#), you can obtain a BAA (business associate agreement) from Google that covers HIPAA security for G-Suite’s core services (Drive, Docs, Sheets, Forms, etc.).

Because the App Script resides within the Google Form Session Note Helper template, it is covered by the BAA.

Obviously, you need to do what you are comfortable with to protect client confidentiality. HIPAA rules and standards say we need to protect any PHI (personal health information). With this clinicians need to know how PHI is handled by their organization and have reasonable measures in place to protect that information.

Again, if you are using the [paid version of G-Suite](#) (or G-Suite for Business) all of your personal/client data is protected according to HIPAA standards as long as you are using Google Drive to store files. You also can obtain the BAA from Google which meets HIPAA compliance.

With all that being said, I am obviously using this system in my own practice. Google absolutely depends on keeping people’s information secure; their business depends on it. I personally feel confident that my client’s information is protected and secure using this system.

Source: <https://sites.google.com/site/scriptsexamples/available-web-apps/form-publisher/terms-of-use#TOC-Ownership-and-Privacy>

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More resources...

Here is more information from Google that goes into more detail about using Google Forms
<https://support.google.com/a/users/answer/9302965?hl=en>