Client Report Forms

Purposes:

- Informational:
    - Writing for other consultants who may work with the client in the future
        - "I wrote my records primarily with my colleagues in mind, who might work with the same student I did at a later date and need some background on the student's concerns and advancements." -Angela Zito, co-coordinator of the Writing Center at the University of Wisconsin-Madison
    - May include:
        - Discussion of what the client brought in
        - How the session went overall (can also address progress/advancement if you meet with the client regularly)
        - Any established strengths/weaknesses/preferences of the client that may be helpful to know for their future visits
        - What consulting methods and techniques were effective/ineffective
- Administrative:
    - Primary audience being the writing center administrators, university faculty/instructors, stakeholders, etc.
    - Serve a record-keeping function for research/funding (i.e. number of clients we serve, demographic information about our clientele, number of times a specific client has visited, etc.)
- Educational:
    - CRFs can serve as a tool for future consultant training
    - Can also serve a self-reflective function and work as an extension of training

Do's and Don'ts:

Do:

- Keep your audience(s) in mind—often they intersect, but comments should be appropriate and informative for administrators, fellow consultants, instructors, and the clients themselves
- Take more than five minutes to complete Client Report Forms
    - Writing in a narrative form is one way to accomplish this (recording the session as sequential events: "We started with *x*, which didn't work, so we switched gears and looked at *y*, which led to discussion about *z*, which was effective because *a*.")
    - If you are rushed in-between sessions, make some notes and elaborate/edit the form later (CRFs can be saved and edited)

- Reference the existing CRFs for the client before the session (click on the appointment and select "View Existing Client Report Form for this Appointment")
- Use as a tool for self-reflection
    - Overlap with mindfulness—taking time to think about the session
    - One way to do this is describing what techniques you used in the session and focusing on <u>why</u> you felt it was or wasn't effective, what you can do differently, new goals for your consulting, etc.
    - CRFs can serve as a record of consultant growth! All CRFs are archived in WCOnline and can be referenced later—good measure of evolution of consulting style and strategies

<u>Don't:</u>

- Use "N/A" or "see below" (in excess)
- Use evaluative statements about the client or the session unless the situation calls for it (in general, aim to describe rather than evaluate)
    - When is evaluation appropriate?
        - The client makes you feel uncomfortable in any way
        - A session is negatively impacted by the client's visit being required for a course
        - The client is resistant, antagonistic, offensive, etc.
        - The client is insistent on you proofreading or editing their work

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