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
  o Overlap with mindfulness—taking time to think about the session
  o One way to do this is describing what techniques you used in the session and focusing on why you felt it was or wasn’t effective, what you can do differently, new goals for your consulting, etc.
  o 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

Don’t:
• 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)
  o 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


