

CASE NOTES: SOAP Note

Contact Date: May 27, 2023 (p. 1/2)

Client Name: Adam Carson

Helper Name: Ginny Fazari

Location: ABC Counselling Agency

Purpose of Contact: Session #1 - Intake & Initial Assessment

Subjective:

Adam shared that he is having difficulty figuring out how to deal with his parents. He expressed that they seem to be good parents when things are going well, however when there is a problem it is ignored, and Adam feels that he is left to deal with things on his own. Adam reports that he is in a place where he is close to "cutting out" his parents.

Adam reported that he is the eldest child in his family, which consists of his biological mother and father, as well as a biological younger brother. He shared that he is not close to his family members and feels that they are all very different than he is. Adam reported that his parents use alcohol frequently and that he feels that this contributes to the difficulties in their relationship.

Adam indicated that his friends and his partner are his primary emotional supports and that he feels very supported in these relationships. He reported that this is a noticeable contrast from his family relationships.

Adam shared that he has never before engaged in a formal helping relationship and that he is typically able to manage life problems on his own, along with the help of his support network. He reported that this problem is bigger than what he feels he can manage within the context of those relationships, which is why he decided to engage in counselling.

Adam shared that he and his parents have had a specific conflict and that he has written them letters to express himself, which they have ignored. He reported thinking about this problem daily and indicated that it causes him a significant amount of distress.

Adam shared that he is a musician and artist and that spending time involved in these pursuits is part of how he copes with distress. Adam reported that for 15 years before the COVID-19 pandemic he was self-employed as a musician, videographer, graphic designer, and concert promoter. However, the pandemic meant that there were no opportunities to do this work, and after his savings were depleted, he took a 9-5 job that he does not find fulfilling.

Objective:

Adam attended this session in casual dress. His emotional tone seemed regulated and calm throughout the session. Adam was heard to express himself in a clear and organized way and appeared to make appropriate eye contact. His facial expressions and body language seemed to be congruent with the topics being discussed.

Assessment:

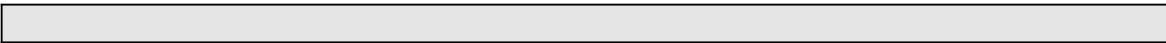
Adam is a 41-year-old man whose presenting concern is that he is experiencing difficulties within his adult relationship with his parents. This is a concern that he has been experiencing for some time, however a specific incident of conflict has prompted him to want to figure out how he would like to address his concerns.

Complicating factors include that Adam reports a career change that occurred because of the COVID-19 pandemic, and that he is now needing to work a 9-5 schedule and commute to/from his workplace. This represents a significant change from his self-employed schedule and has added to the level of stress in his life.

Protective factors include that he reports feeling adequately supported within his non-familial social and romantic relationships, and that he has many strengths and interests which he was easily able to identify when asked.

Plan:

Next session will continue the assessment process. The goal is to continue to explore Adam's specific hopes for counselling as well as his strengths and values. Scheduled for June 10, 2023.

Signature:

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Contact Date: June 10, 2023 (p. 1/2)

Client Name: Adam Carson

Helper Name: Ginny Fazari

Location: ABC Counselling Agency

Purpose of Contact: Session #2 - Assessment

Subjective:

Adam reported that the first session was helpful in terms of helping him "solidify some things in his mind" and that it was a positive experience overall.

Adam completed the "Tree of Life" assessment activity. While debriefing, he expressed the following key points:

- He is not a "money-centric" person, and it is important that others know this.
- Given more time, he would be able to add to each of the sections and therefore this "Tree of Life" does not represent everything of value to him.
- Some of his values are misaligned with the values that his parents express.
- The relationships that he has chosen are with those whose values are in alignment with his own.

Adam shared that he is currently considering how much contact he wants to maintain with his parents. He reported that over the last year he has limited his contact to family celebrations only and has not reached out to connect with them otherwise. He indicated that he does not know whether they have noticed this change in his level of contact, as they have not mentioned it. Adam describes his time with them as a "performance." He spoke about loyalty and obligation being the primary reasons that he continues to attend events with his family, despite feeling disconnected and distressed. In addition, he shared that he would not feel comfortable further reducing his contact with his parents without having a full conversation with them explaining how he is feeling.

Adam reported that a key reason he has not initiated a conversation with his parents is that he does not feel that he has the "space" in his life to do this. Adam described the significant emotional fallout he feels would arise from engaging in a conversation with his parents ("opening a can of worms") as requiring more time and energy that he has available at this time. Adam described other things getting in the way, such as needing to ensure that it is not too close to a family celebration and his parents' reluctance to leave their dogs at home to meet somewhere neutral.

By the end of the session, Adam expressed that he did want to initiate a conversation with his parents in the relatively near future (7 out of 10 on a scale of "ready to take action"), as this is the longest stretch of the year without family celebrations. The primary barrier to doing this is the emotional energy this will take (2 out of 10 on a scale of "space in my life"). He acknowledged that this was a significant gap between desire and ability, and that he was comfortable exploring this further in upcoming sessions.

Objective:

Adam attended this session in casual dress. He appeared relaxed and comfortable throughout the session. Adam participated actively in both the drawing and writing components of the "Tree of Life" assessment activity.

Adam's tone was regulated and congruent with his body language throughout the session.

Adam did not appear to find much of therapeutic value in the "Tree of Life" activity, stating only that it was "interesting to try and sort things into whatever boxes they're supposed to go into." While debriefing the activity, Adam used language that was concrete and values-oriented, not emotional. Adam only referenced the "Tree of Life" in the session when he was prompted to do so.

Adam appeared to express grief regarding the state of his relationship with his parents, as evidenced by his statements of it feeling "incredibly empty" and "so pointless."

Assessment:

Adam seems to be experiencing grief about the state of his current relationship with his parents, as well as ambivalence around whether or how he would like to approach this. He articulates many barriers that are preventing him from acting, yet states that he wants to take action soon. In terms of stages of change, Adam can be considered to be in the contemplation stage and may benefit from further exploration of his values, needs, and desires before he can move into the preparation stage.

Adam articulates strong values of loyalty and integrity, which likely play a role in the distress he is experiencing when he is not expressing his true self around his parents.

Plan:

Adam has agreed that he would benefit from further exploring whether/how he can create more emotional space in his life, so that he feels ready to initiate a conversation with his parents. This will be the focus of the next session, which is scheduled for June 24, 2023.

Signature: 

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Contact Date: June 24, 2023 (p. 1/2)

Client Name: Adam Carson

Helper Name: Ginny Fazari

Location: ABC Counselling Agency

Purpose of Contact: Session #3 - Goal Setting

Subjective:

Adam reflected that the most helpful thing about the last session was the realization that despite his desire for action, dealing with the situation with his parents is going to take up time and energy that he doesn't currently have.

Adam shared that he attended his parent's home for Father's Day and that while it was pleasant, this was only because he put his feelings in a box in his mind and ignored them. He expressed that he did not want this to continue.

Adam spoke about his previous experiences with setting and achieving goals. He described two separate processes:

- Goals with specific logical and sequential steps that need to be accomplished. There are deadlines and scheduling involved.
- Goals that are generative and lack structure. For example, songwriting and other creative endeavors that he cannot perform on a specific schedule.

Adam shared that he feels equally good when he accomplishes goals using either process. However, he expressed that the second type of goal has not been able to be accomplished in recent months due to his life being "too full" of non-preferred tasks such as work, commuting, and day-to-day commitments. He agreed to spend the session exploring how to create space in his life to allow him to feel that he has the time and energy he needs to initiate a conversation with his parents.

After creating a list of tasks that he needs to accomplish on a weekly basis and comparing this to the number of hours available to him, Adam determined that he was maximizing his time and could not reduce his commitments. Adam also created a list of things that bring him feelings of rejuvenation and fulfillment and reported that he had not been able to do any of these things since starting his new job. When asked to consider what life would be like if he prioritized some of these fulfilling activities, Adam explained that it would mean that he could not fulfil his obligations. He shared that he felt that adding any of these things into his life was not possible at this time.

Adam expressed that his life seemed to be moving very quickly and that he was going from one thing to another without time to rest. He shared that prior to COVID-19, he had more autonomy over his schedule and could include long, unstructured breaks to recharge. He identified that the feeling he felt most often was anxiety, which he does not like, but does not believe he can change.

At the end of the session Adam shared that he did not feel this process of exploring how to create space in his life was helpful and he does not believe it is a problem that can be solved. Adam stated that he would like to return to focusing on his specific goal of exploring his relationship with his parents, specifically how to take the first step of initiating contact with them to plan a meeting.

Objective:

Adam attended this session in casual dress. He remained regulated throughout the session, however he seemed to express more distress with his body language (furrowed brow, frowning, sighing) than in previous sessions. He also used very concrete language such as "have to", "no choice", "never", and "always".

Adam was able to quickly create a list of things that would feel fulfilling to him. When discussing this list Adam appeared sad and his eyes teared up, although no tears fell. He was able to identify that he felt resentful about the changes in his life, however he did not articulate any other feelings.

When exploring ways to increase opportunities for fulfillment, Adam's body language seemed to become more tense (narrowed eyes, furrowed brow, rubbing his beard) and he increased his pace of speaking and emphasized specific words. Asking Adam to consider one specific thing that he could incorporate into his life further was unsuccessful as he ran through each item on the list and explained why it was not possible.

Adam demonstrated self-advocacy when he stated that he did not see the connection between the content of this session and his goals and requested to return to the topic of his parents in the next session.


Assessment:

Adam reports that he puts his own needs last and that he is feeling anxious and distressed on a regular basis. Today's session attempted to illustrate the link between these two things, however Adam feels that they are not connected. Adam describes having little agency over his life and how he spends his time, and struggles to acknowledge the ways that he could change or adapt this, even a little bit.

Adam is experiencing loss and grief in multiple areas of his life, which may be magnifying the grief that he feels about his relationship with his parents. He would like to return to discussing how to address this relationship in future sessions.

Plan:

Adam has requested to use the next session to create a plan for how to initiate communication with his parents so they are aware that he would like to schedule a time to talk further. This session is scheduled for July 8, 2023.

Signature: 

CASE NOTES: SOAP Note

Contact Date: July 8, 2023 (p. 1/2)

Client Name: Adam Carson

Helper Name: Ginny Fazari

Location: ABC Counselling Agency

Purpose of Contact: Session #4 - Action Planning

Subjective:

Adam expressed that he reflected on the content of the previous session and that increasing the amount of time that he spends on fulfilling activities is an ongoing goal, but not relevant to his current concerns. He shared that he appreciated the conversation, but prefers to remain focused on his relationship with his parents.

Adam explored the planning required for him to feel comfortable initiating contact with his parents and setting up a meeting. He created the following plan:

- *Method:* Adam indicated that his options are calling or texting. After exploring both options, Adam determined that he prefers to reach out to them via text message.
- *Message:* Adam shared that he wants to be purposeful about the content of this text message and provide them with as little information as possible. Adam decided that the message would be a brief communication letting them know that he wanted to set something up and asking what date they were free.
- *Timing:* Adam reported that he has decided that the conversation needs to occur prior to the end of summer and has created a deadline for himself. He also shared that he would prefer to take a vacation day from work so that he is not giving up any of his weekend time.
- *Place:* Adam reported that there are several barriers to meeting in public or at his home, and he feels that the only place they can meet is his parent's house. Adam indicated that this is not his preferred place, however he would like to meet with them where the conversation is most likely to be productive.
- *Ground Rules:* Adam shared that he has some rules that need to be respected for him to be willing to participate in the conversation. These include engaging in productive conversation (no yelling, no threatening) and staying calm. He also spoke about the possibility of offering to record the conversation either at the beginning, or if the conversation begins to be unproductive.
- *Goals:* Adam articulated some general hopes for the outcome of this conversation, including that his parents take accountability for their actions and provide validation of Adam's experiences and feelings.

Adam described the relationship dynamics between himself and his family members. He shared that he has historically not expressed himself to his parents as an autonomous adult, and that last Christmas was the first time he did this (but only to his father after his mother had gone to bed). He also emailed them two letters expressing himself about the identified conflict, but this was ignored. Adam indicated that it is possible his parents are not capable of engaging in an emotionally mature conversation, but he feels obligated to give them a chance before deciding how he wants to manage their relationship moving forward.

Objective:

Adam attended this session in casual dress. He participated actively in all aspects of the conversation, even when it was distressing. His affect was appropriate throughout and was congruent with the thoughts and feelings he expressed.

Adam appeared to experience distress at multiple points in this conversation. He demonstrated this through gesticulation, clapping his hands, emphasizing key words ("their dogs"), increasing the speed of his speech, rubbing his face, and picking at the skin on his elbows.

When asked, Adam struggled to identify and articulate his own preferences and needs with regards to where he would like to meet with his parents, rather he continued to reference his parents' needs in these moments.

In contrast, Adam appeared more comfortable demonstrating indignation at his experience of betrayal by his parents. He expressed this clearly using words such as "unacceptable", "they screwed up", and "consequences". He stated that despite the meeting taking place in the home where he was disciplined as a child, in this case he felt as though he needed to "discipline them". Adam expressed these sentiments confidently and with a tone of conviction.

Assessment:

Adam appears to struggle to articulate his own preferences, deferring and prioritizing the needs and preferences of others. He identifies this as part of his easygoing and capable personality; however, it was noted that he was unable to identify his preferences when asked directly about what they would be in a hypothetical situation.

Adam's relationship with his parents seems to be more of a parent/adolescent dynamic. His parents do not consult him about decisions that affect his life, and he is expected to defer to their preferences and needs. He has not been married, nor does he have children and there have been no other significant life events that have naturally promoted a change in this dynamic. However, Adam has become dissatisfied with this dynamic and is considering the benefits and costs of changing this.

Adam's ability to create a concrete action plan in this session demonstrates that he has moved from contemplation into the preparation stage of change.

Plan:

Adam expressed that he needs some time to get things settled in his life and will not be taking the first step of contacting his parents prior to our next session. Therefore, the plan for next week is to continue strategizing about the specifics/content of the conversation he wants to have with his parents. The next session is scheduled for July 15, 2023.

Signature: 

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Contact Date: July 15, 2023 (p. 1/2)

Client Name: Adam Carson

Helper Name: Ginny Fazari

Location: ABC Counselling Agency

Purpose of Contact: Session #5 - Staying on Track

Subjective:

Adam shared that the plan created in the last session is good, however he needs to postpone his plans due to a death in his extended family. Adam indicated that he is unsure how his parents will be coping, or whether they will need to travel out of province to support family members or attend a funeral.

Adam expressed that after the previous session he feels confident that he will move forward with initiating this conversation with his parents, even though he "doesn't want to do it." When discussing how to use the final two sessions, Adam was offered an opportunity to explore ways to stay on track despite not wanting to, and he indicated that he felt this would be helpful.

Adam identified that when he does not want to do something he tends to procrastinate it until the point where it becomes urgent and necessary. He identified that when he has limited time, he feels that the decision to complete tasks is not within his control, rather it is dictated by necessity. He also identified that he uses "structured procrastination" as a method of completing additional non-preferred, less urgent tasks when he does not want to complete a task that is "on its way" to becoming urgent.

In terms of the conversation with his parents, Adam acknowledged that he has given himself a deadline to create a sense of urgency and therefore increase his likelihood of completing the task. He also acknowledged that he might use "structured procrastination" to avoid scheduling a conversation with his parents, however once it is scheduled, he will follow through. In addition, Adam reported that if the deadline is quickly approaching, he will likely force himself to reach out as the task will be considered urgent. However, he also has given himself a buffer deadline of an additional month of time that he can use if needed, as a contingency plan.

Adam identified additional things he plans to do to stay on track, including re-reading the email letters that he sent to his parents, continuing to stay on top of other life tasks, and taking additional days off work around the day he schedules for the conversation so he can be in a more relaxed and prepared state.

When discussing the plan for the final session next week, Adam requested to spend this time strategizing around the things he wants to say to his parents so that he can feel more confident in his approach. When asked, he indicated that he did not have any particular need or preference for a closing ritual or activity, but that he would give it some thought.

Objective:

Adam was dressed casually and comfortably for this session. He remained regulated throughout the session and his vocal tone and body language were congruent with the themes discussed.

Adam participated actively in the discussion about the obstacles he may encounter that would prevent him from moving towards his goal. He seemed aware of and able to articulate his behaviour patterns of procrastinating.

Adam's mood seemed more relaxed today, and he was quick to laugh and smile throughout the conversation.

Assessment:

An unexpected death in the extended family has resulted in Adam needing to postpone taking the step of scheduling a time to meet with his parents. As this is the second last session, it is unlikely that Adam will be able to take action towards his goal prior to termination. Although the initial plan for today's session was to strategize around the content of the conversation Adam wants to have with his parents, it was felt that the time would be better spent exploring Adam's experiences of taking action, including what gets in the way and what moves him closer towards his goals.

Adam was able to identify the patterns of avoidance/procrastination that he exhibits in his life, as well as the ways that he has accommodated for these patterns in this situation. Although Adam expresses confidence that he will meet his goal in this situation, he also continues to experience a sense that many aspects of his decision to move forward are outside of his control. These include whether he feels that he has the emotional energy to have the conversation, and whether he has additional, pressing tasks that he needs to complete. Adam described feeling the same level of distress and anxiety regardless of when he contacts his parents, and this may lead him to avoid initiating until the distress of the impending deadline is more intense than the anxiety felt about initiating the conversation.

Adam does not seem to be bothered about terminating the helping relationship after next week's session and has not expressed concerns about continuing to move towards his goal on his own. Because of this, it is felt that the best use of the final session will be to follow Adam's lead and use the session to further solidify the therapeutic gains he has made to date and cement his commitment to future action.

Plan:

Adam is aware that the next session will be the final one. Given the competing levels of determination and ambivalence around taking action, the plan is to use much of the session to continue to strategize and create a concrete plan of what Adam would like to say in his conversation with his parents. The remainder of the session will be used to reflect, summarize, and wrap up the counselling relationship.

Signature: 

CASE NOTES: SOAP Note

Contact Date: July 19, 2023 (p. 1/2)

Client Name: Adam Carson

Helper Name: Ginny Fazari

Location: ABC Counselling Agency

Purpose of Contact: Session #6 - Closure

Subjective:

Adam reported that his preference for today's session was to create a strategy for how he will approach/initiate the conversation he wants to have with his parents.

Adam discussed three approaches that he has been considering (Please see Approach Options/Action plan in file for more details):

- Starting the discussion by asking his parents if they knew why he had asked to meet with them, or if they have noticed anything different about how he's been interacting with them.
- Starting the discussion by stating how he is feeling and letting his parents know why he asked to meet with them.
- Starting the discussion by outlining his actions to date (waiting for acknowledgement of his letters) and asking his parents how long they feel it is reasonable for him to continue carrying the emotional burden in their relationship.

Explored the pros and cons of each of these approaches. Adam identified that the second approach was the most neutral, while the third approach is the most satisfying. Through discussion, Adam ultimately determined that he felt that each of these approaches had benefits depending on how the conversation started, and that he may switch from one to another based on his parents' response. Adam stated that he feels that he will request to meet with his parents in the morning so that they will be sober.

Adam indicated that he felt that this strategizing was useful.

Spent the remainder of the session reviewing progress made, and Adam's experiences of the counselling process. Adam shared that the most impactful part of his experience is that he has been able to organize his thoughts and feelings, which allowed him to make a plan. He also identified that it was useful to explore the various approaches and analyze their effectiveness.

Adam shared that the least useful approach was when we spent the session exploring how he could make more space in his life, as it felt irrelevant to his presenting concern.

In terms of progress, Adam indicated that he feels much more prepared to move forward with his plan than he was at our initial session, and that this felt good. He shared that the counselling process was a positive experience, that he was comfortable terminating the helping relationship and would be willing to re-initiate contact if needed in the future.

Objective:

Adam attended this session in casual and relaxed dress. He remained regulated throughout the session and his vocal tone and affect were congruent with the topics discussed. He demonstrated some distress in the session, primarily when talking about ways he has been hurt by his parents. This was evidenced by a tensing of muscles in his body, a more firm and clipped tone of voice, and emphasizing key words.

Adam participated actively in the session and seemed willing to receive and incorporate feedback. His body language remained open and he nodded and pursed his lips while considering this. Adam was receptive to psychoeducation about communication strategies, including "I" statements.

Adam appeared comfortable when discussing the termination of counselling. His body language remained neutral and relaxed and his tone of voice was calm.

Assessment:

Adam has moved fully into the preparation stage of change and seems to want to maintain momentum as he moves towards his goals. Adam also seems to be pragmatic in his approach and preferred to use the time we had for the final session to continue to strategize about next steps, rather than reflect on the past. Due to these factors, it was felt that the best use of the termination session would be for Adam to feel more confident about moving into the action stage of change in the coming weeks.

Adam now has a concrete plan for how to initiate contact with his parents to schedule a meeting and has explored the pros and cons of three different approaches to beginning the conversation. He has considered his desired outcomes, as well as the ground rules he would like to set to ensure that the conversation remains productive. He has been provided with a paper copy of the Action Plan and has expressed confidence in his ability to follow through.

Plan:

This is the sixth and final session, and the file will now be closed to ABC Counselling Agency. Adam is aware that he can reach out directly to re-initiate sessions, or to receive additional copies of the documentation created in sessions. Adam declined additional referrals, indicating that he feels that he feels comfortable moving forward without formal support at this time. Adam was provided with some information about a podcast that he may find useful.

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