School & Teacher Collateral Note Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · August 2026

A school & teacher collateral contact note is the therapist's chart record of a conversation with a teacher, school counselor, or other school staff member about a minor client: what the school reported, what you shared, and what it changes in treatment. Most run 100 to 300 words.

The custodian decides the law: the same observation sits under FERPA in the teacher's file at school and under HIPAA and state law once it enters your clinical chart (HHS HIPAA FAQ 518). A teacher's private memory aid loses FERPA's sole-possession exemption the moment it is shared, including by emailing it to you, so write what you send as if the family will read it.

Contact header method and minutes are data
Do: record client identifiers and age, the date of contact, the method (phone, in person, video, email), and the duration in minutes.
Pitfall: no minutes recorded; a time-based code such as H0046 with a 15-minute minimum is unbillable from an untimed note.

Who you spoke with a source you can defend
Do: name the contact with role and school, and note how you verified identity (a call back through the main line, a school email domain).
Pitfall: "spoke with the school"; a note that cannot name its source cannot defend the treatment decisions built on it.

Authorization on file check the named party before dialing
Do: record the release date, the guardian who signed it, the named parties, the direction it covers (receive, disclose, or both), and its expiration.
Pitfall: assuming the intake release covers the school; a release naming the pediatrician does not authorize the teacher call.

Purpose tied to a plan goal planned collateral, not a courtesy call
Do: connect the contact to a specific treatment-plan goal in one line; rules like New York's exclude brief information requests.
Pitfall: "called to check in"; a purpose that names no goal reads as exactly the category payers refuse.

Information gathered, attributed the teacher's words, kept observational
Do: record what the teacher reported, attributed by name: on-task minutes, work completion, peer behavior, what helps.
Pitfall: absorbing the teacher's report into your own clinical voice; unattributed third-party material contaminates later findings.

Information you shared the outbound half is evidence
Do: itemize every disclosure, held to the minimum necessary for the purpose.
Pitfall: recording only the inbound half; if the release's scope is ever questioned, a missing disclosure list reads as "unknown".

Clinical use and next step what the information changes
Do: state the plan update, the rating scale to integrate, or the re-contact date; collateral should never be the sole basis for planning.
Pitfall: collateral that arrives and changes nothing invites the question of why it was collected at all.

Billing status and signature the audit-visible close
Do: state plainly whether the contact is billable (usually not; some state Medicaid programs pay under H0046), then sign with credentials and date; supervisor co-signature if pre-licensed.
Pitfall: routing an information call through 90846; repeated claims without documented clinical justification are a known review trigger.

Before you sign

- [ ] Method and minutes recorded in the header
- [ ] School contact named with role; identity verified
- [ ] Release covers this school, both directions, unexpired
- [ ] Purpose names a treatment plan goal
- [ ] Every teacher observation attributed by name
- [ ] Information shared itemized, minimum necessary
- [ ] Billing status stated; signed with credentials

Drafting with AI

Capture 30 seconds of bullets after the call, or paste the teacher's email thread: who and role, authorization status, what the teacher reported, what you shared, the plan goal, the next step.

> *"Draft a school collateral note from these bullets, 10-year-old in treatment for ADHD, teacher call for baseline classroom data on plan Goal 2, two-way release on file: …"*

Never paste child-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

100 to 300 words	5 to 10 min by hand	After each school contact	Care team · parents · auditors
typical length	clinical team estimate	when it's written	who reads it

Full guide and sample note:
bastiongpt.com/template/school-collateral-note

BastionGPT drafts the collateral note from your call bullets or the teacher's email. Free 7-day trial.

School & Teacher Collateral Contact Note Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Client (initials): Age: Date of contact:

Method: ☐ phone ☐ in person ☐ video ☐ email Duration (min):

School contact (name, role, school): Identity verified by:

Authorization on file

Release naming this school, signed by the guardian with medical decision-making authority

Release signed (date): By (guardian): Expires:

Covers: ☐ receiving info ☐ disclosing info ☐ both directions

Purpose (treatment plan goal):

Information gathered from the school

Attribute to the source by name; keep it observational: on-task time, work completion, peer behavior, what helps, agreed rating scales

Information shared with the school

Itemize each disclosure, minimum necessary for the purpose; no diagnosis, medication, or session content unless the release covers it

Clinical use / next step

What the information changes: plan update, rating scale to integrate, topic for the next parent session, re-contact date

Billing: ☐ non-billable collateral ☐ state Medicaid code:

Clinician signature / credentials: Date signed:

Supervisor co-signature (if required):

Full guide and sample note:
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