

Telehealth Psychotherapy Note Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A **telehealth psychotherapy note** is the progress note for a therapy session delivered by video or phone. It carries everything a standard session note does, plus the telehealth layer in the header: modality, client location, provider location, consent, and times. No law mandates a telehealth note format; payer rules govern the content.

Technology & session setup the session's how

Do: record the platform, connection quality, interruptions with times and how they were handled, and who else is present at the client's location.

Pitfall: silence about a mid-session drop; if the session finished by phone the modality changed (modifier 93, not 95), and an unexplained gap reads as unsupported time.

Emergency plan for this session location-specific safety

Do: confirm the client's specific location and a local emergency contact, and note the plan if the connection drops during a risk discussion.

Pitfall: a generic "safety plan in chart" line; remote emergency response depends on where the client actually is today.

Session content & interventions still the point

Do: document presenting concerns, themes, and the therapeutic work delivered, with the same clinical substance as an office session.

Pitfall: telehealth logistics crowding out the psychotherapy; the billed service is still therapy, not a video call.

Mental status & response as observed by video or phone

Do: record what you actually observed on camera or heard by phone, and note anything the modality limited.

Pitfall: charting findings the modality cannot support, such as full appearance detail from a head-and-shoulders frame.

Assessment, risk & progress medical necessity lives here

Do: tie the session to treatment plan goals, state risk status, and note continued suitability for telehealth.

Pitfall: assessment that never says whether virtual delivery still serves this client; suitability is a clinical judgment worth showing.

Plan & next steps dated, with modality

Do: record interventions for coming sessions, homework, the next appointment, and the planned modality.

Pitfall: a bare "continue treatment"; tie the plan to a goal and say whether the next session is video, phone, or in person.

Before you sign

- ☐ Modality recorded, with the reason if audio-only
- ☐ Client location and provider location both in the note
- ☐ Consent noted: obtained or on file, with date
- ☐ Emergency plan session-specific: location, local contact
- ☐ Technology issues documented with times and handling
- ☐ Time supports the code: start/stop or total
- ☐ Signed with credentials, dated promptly

Drafting with AI

Capture 30 seconds of bullets after the session: modality, locations, consent status, tech issues, themes, interventions, scores, risk, plan.

"Draft a telehealth psychotherapy note from these bullets for a 53-minute video CBT session, client at home, MDD, session 8 of 16: ..."

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

150–400 words
typical length

10–20 min by hand
clinical team estimate

After every virtual session
video or phone

Care team · payers · auditors
who reads it

Telehealth Psychotherapy Note Template

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

Client (initials): _____ Date: _____ Session #: _____ Modality: ☐ video ☐ audio-only, reason: _____

Client location & setting this session: _____ Provider location: _____

Telehealth consent: ☐ on file, date: _____ Start/stop times: _____ Total time (min): _____

Technology & session setup

Platform, connection quality, interruptions with times and how handled, who else is present at the client's location

Emergency plan for this session

Client's specific location confirmed, local emergency contact or number, plan if the session drops during a risk discussion

Session content & interventions

Presenting concerns, themes, and the therapeutic work delivered this session

Mental status & response

As observed by video or phone: appearance, affect, speech, engagement; note anything the modality limited

Assessment, risk & progress

Progress toward treatment plan goals, risk status, continued suitability for telehealth

Plan & next steps

Interventions for coming sessions, homework, next appointment and planned modality

Clinician signature / credentials: _____ Date signed: _____