AI-Drafted Notes Review Checklist

This checklist is for therapists who use an AI assistant to draft progress notes from their own session notes. With the following checks in place, drafting notes with AI can be done in a safe and ethical way.

- [ ] **Draft from your own brief notes, written after the session, and de-identify them unless your organization has approved the AI system for client information under a business associate agreement (BAA).**
- [ ] Ask the AI assistant to use only the information you give and to mark anything missing for you to fill in.
- [ ] Confirm that every statement describes something that happened in this session, and delete anything the draft added.
- [ ] Check quotes, numbers and the client's own words against your notes.
- [ ] Confirm that the risk assessment reads exactly as you conducted it, including what the client reported and what you did.
- [ ] Confirm that the symptoms, progress and diagnosis match your own clinical judgment.
- [ ] Confirm that the interventions, the client's response and the plan match the session.
- [ ] Make sure the note is specific to this session and holds no text carried over from earlier notes.
- [ ] Edit the wording so the note reads in your own professional voice, with respectful language.
- [ ] Add identifying details only in your practice's health record system, and sign the note there.
- [ ] Follow your work setting's policy on documenting AI assistance and your profession's ethics code on informed consent.
- [ ] Follow your work setting's crisis protocol whenever a situation involves risk.

This checklist follows the CAMFT Code of Ethics and APA guidance on AI in professional practice as they read on November 23, 2026.