How to use the AI note taker in SimplePractice

This guide shows you how to use the AI note taker in SimplePractice, called Note Taker, to record a session, generate a draft note, and finish your documentation. Note Taker uses a human-centered AI approach. It quickly creates a draft note, and you stay in control of editing and improving it before you sign.

Prerequisites

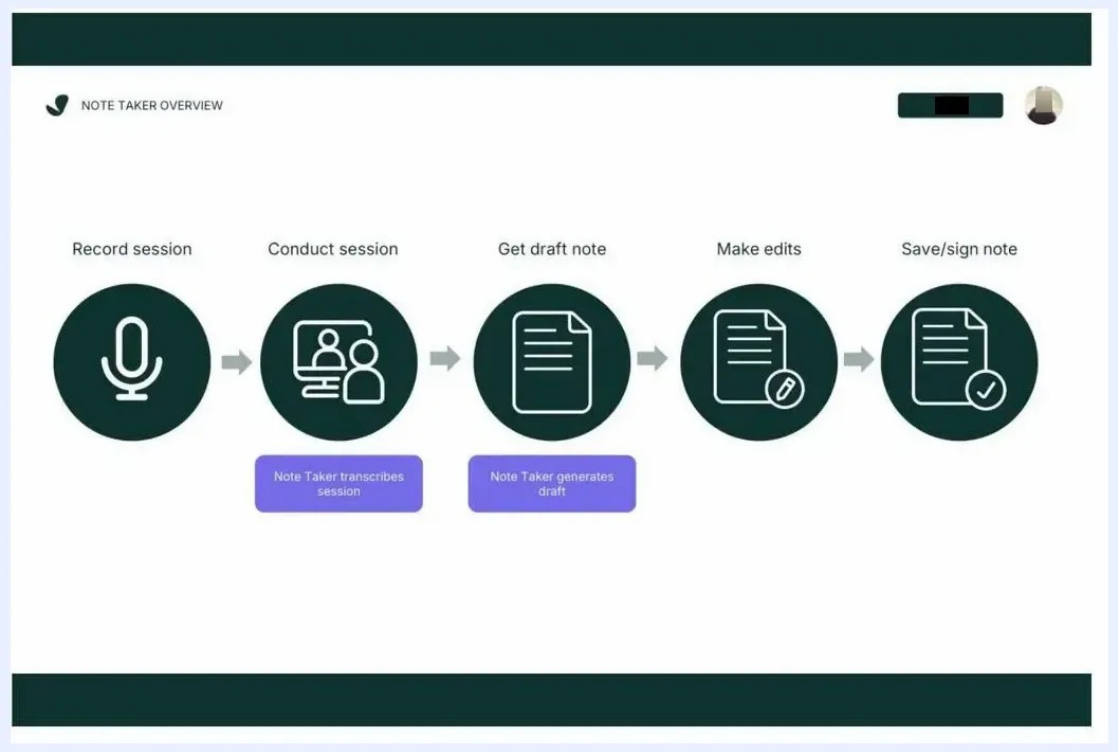
- A telehealth or in-person appointment. Note Taker works with both, and with all session types.
- Previous progress notes for the client. Note Taker uses them as a reference when it writes the draft.

Step 1: Understand the Note Taker workflow

Note Taker adds one new step to your usual appointment flow: recording the session. The workflow has five stages:

- **Record session:** You start the recording.
- **Conduct session:** Note Taker transcribes the session.
- **Get draft note:** Note Taker generates a draft note.
- **Make edits:** You review, edit, and personalize the draft.

- **Save/sign note:** You save and sign the finished note.



Appointment flow diagram showing Record session, Conduct session (Note Taker transcribes session), Get draft note (Note Taker generates draft), Make edits, and Save/sign note

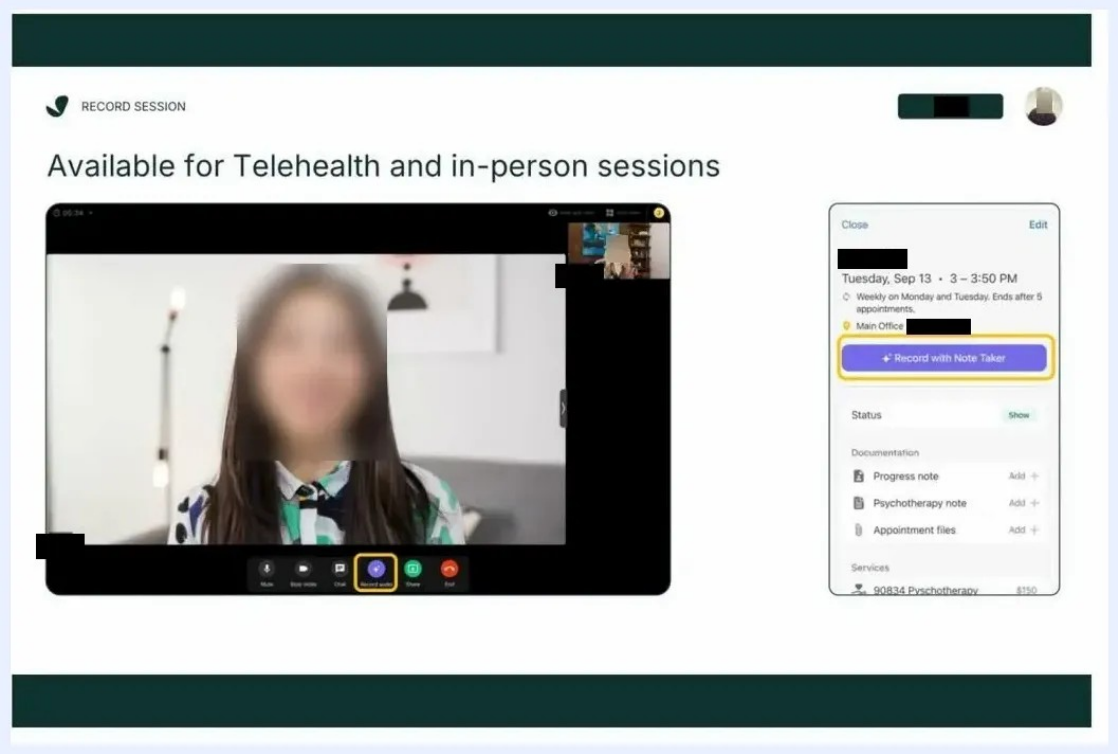
Behind the scenes, Note Taker automatically generates a transcript and a draft note from the recorded session.

Step 2: Start the AI note taker at the beginning of your session

Note Taker is built into your existing appointment flow, so you can start it with a single click at the start of any appointment.

- For telehealth sessions, click the **Record audio** button in the video call controls.

- For in-person sessions, click the **Record with Note Taker** button in the appointment details panel.



Telehealth video call with the Record audio button highlighted, and the appointment details panel showing the Record with Note Taker button for in-person sessions

Step 3: Stop and resume Note Taker during the session

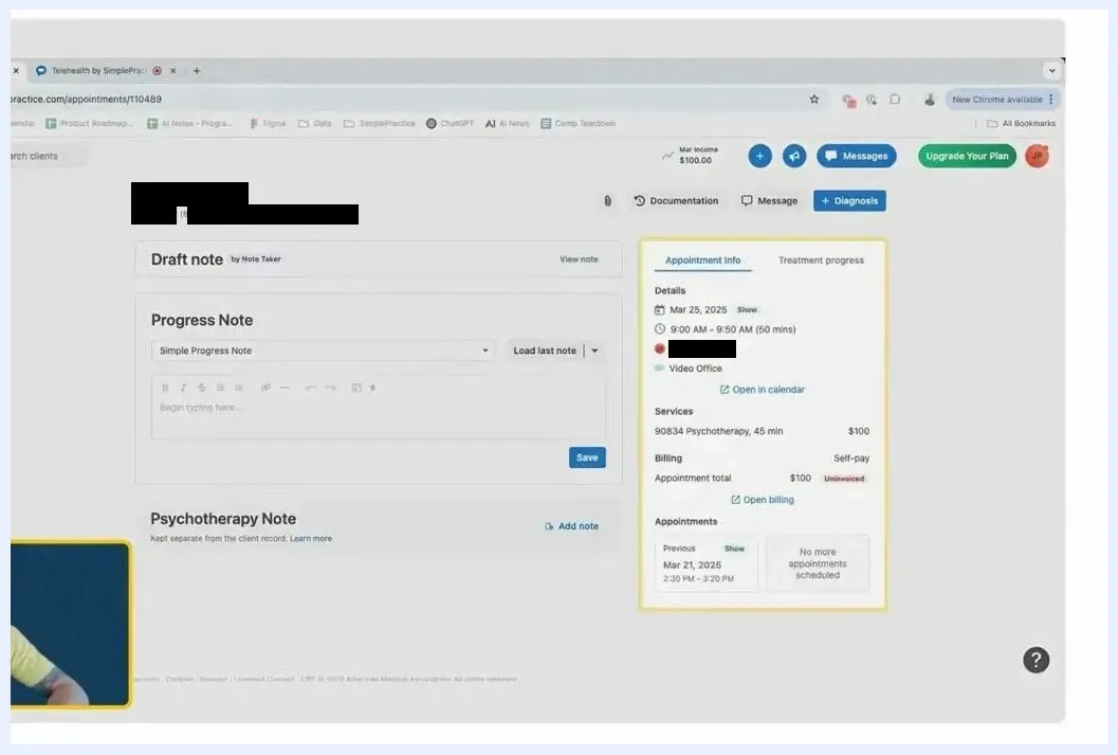
During the session, Note Taker records the appointment to generate both a transcript and a draft note. If you want to leave part of the conversation out, use the available controls to stop Note Taker.

Resume Note Taker when you are ready to continue documentation. Note Taker combines only the portions you chose to record. It leaves the excluded segments out of the final transcript and draft note.

Step 4: Wait for the draft note to process

After the session, Note Taker transcribes your appointment and generates a draft note. Each draft note is linked to its specific appointment.

If you check right after the session, you may see a status indicator showing that Note Taker is still working. Wait a few moments. When processing is complete, the draft note is available for review and editing.



Appointment details page showing the Draft note by Note Taker banner, the progress note section, and appointment information for a client

Step 5: Open the draft note from the appointment

Once transcription is complete, open the appointment record for the relevant client. A **Draft note by Note Taker** banner appears at the top of the page. Click **View note** to open the draft.

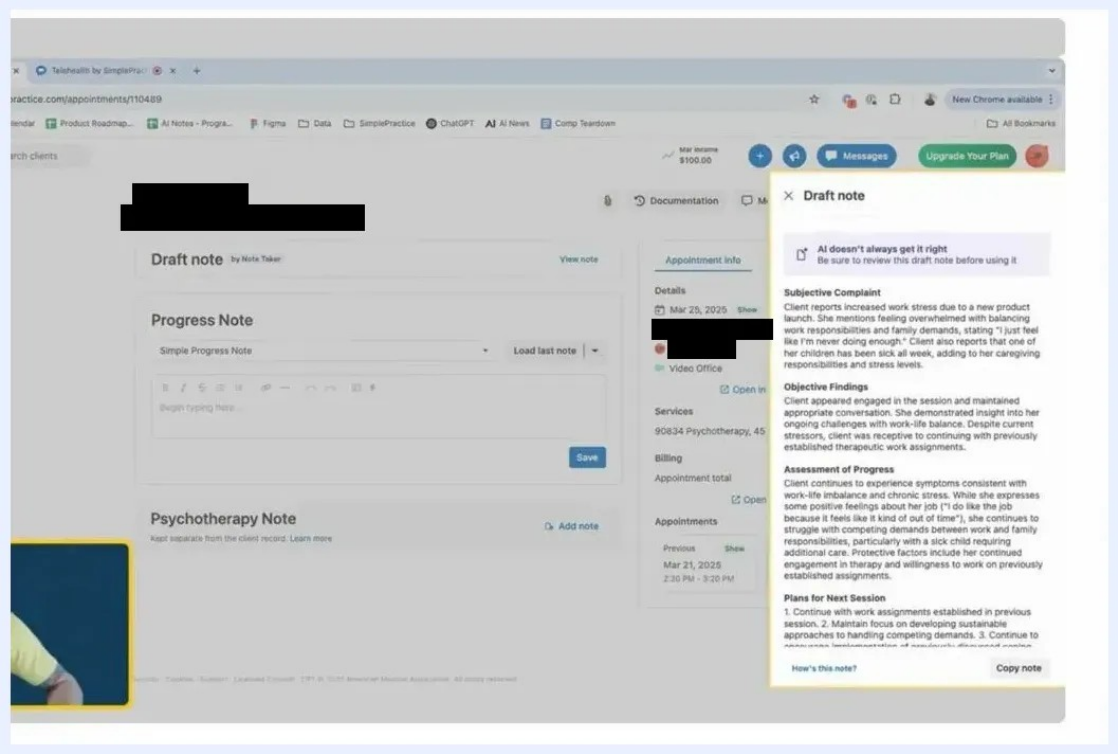
Step 6: Review the draft note

Note Taker builds the draft from your previous progress notes. It adapts your writing style, tone of voice, and formatting, and it applies the type of note you typically use with each client.

The draft appears in a sidebar on the right side of the screen. A warning reminds you: "AI doesn't always get it right. Be sure to review this draft note before using it."

The draft uses the SOAP format:

- **Subjective Complaint:** Summarizes the client's reported issues, such as work stress, feeling overwhelmed, or family demands.
- **Objective Findings:** Describes the client's engagement and observed behaviors during the session.
- **Assessment of Progress:** Evaluates the client's ongoing symptoms and progress.
- **Plans for Next Session:** Lists actionable steps or goals for future sessions.



Draft note sidebar in SOAP format with Subjective, Objective, Assessment, and Plan sections, and a warning to review the AI-generated note

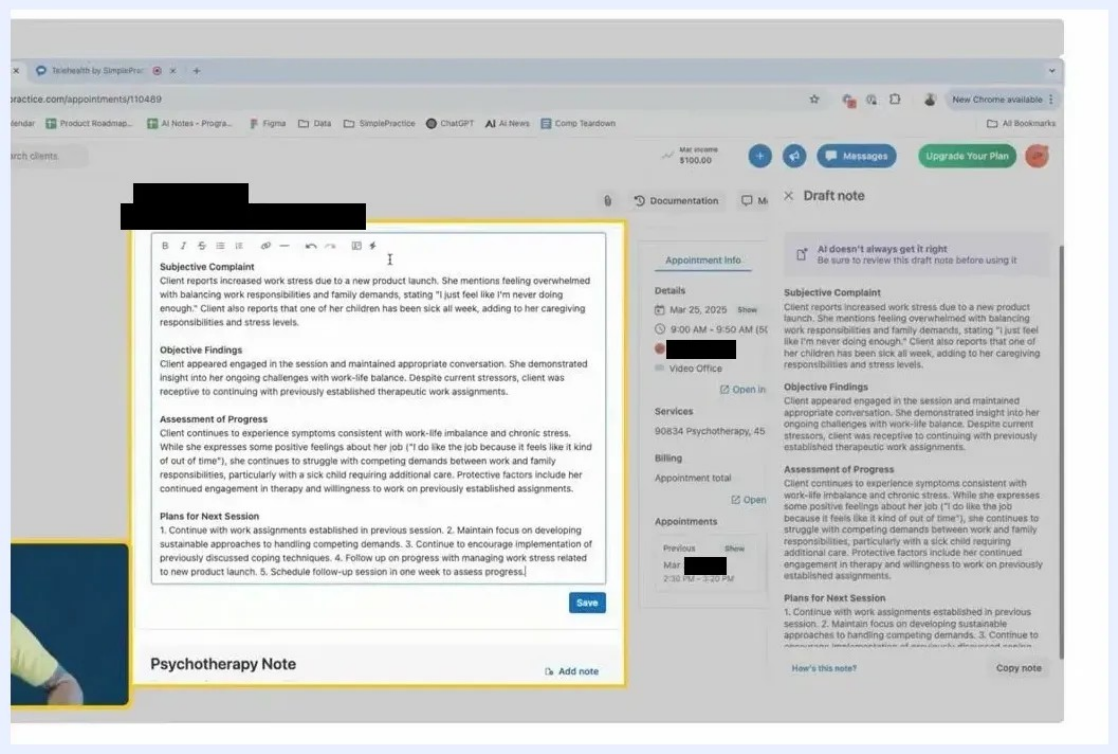
For example, a draft might read: "Client reports increased work stress due to a new product launch..." in the subjective section, and "Continue with interventions established in previous session..." in the plan.

Step 7: Copy the draft note into your progress note

You can copy the draft one section at a time or all at once.

To copy a single section:

1. Hover over a section in the sidebar, such as **Subjective Complaint** or **Plans for Next Session**. The section is highlighted and a **Copy** button appears next to it.
2. Click **Copy** to copy only that section to your clipboard.
3. Paste it into the main progress note field or wherever you need it.

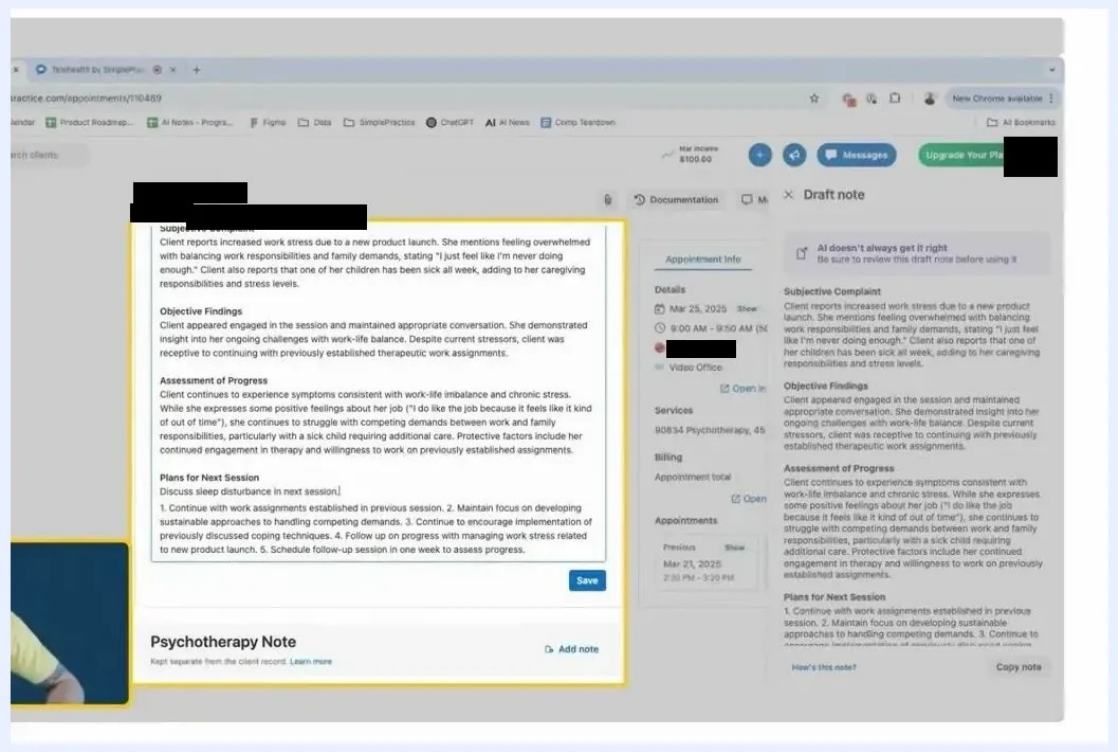


Draft note sidebar with one section highlighted and the Copy button visible

To copy the entire draft:

4. Scroll to the bottom of the draft note sidebar.
5. Click **Copy note** to copy all sections to your clipboard.

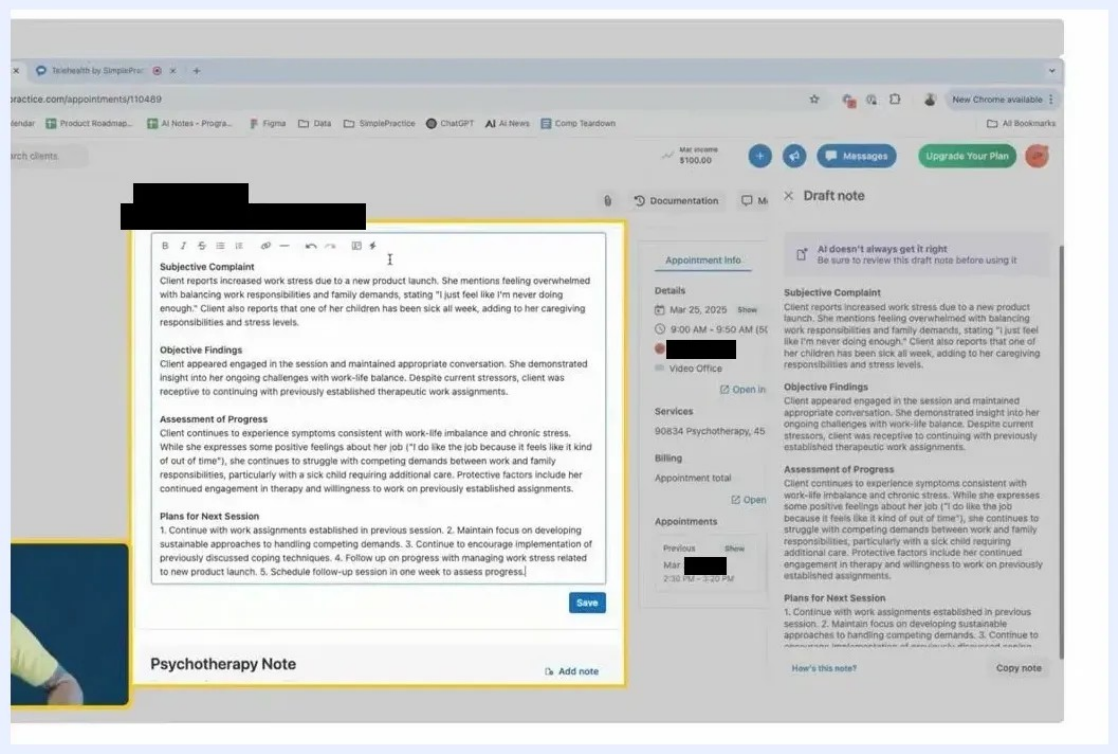
6. Paste the content into the main progress note field.



Finalized progress note with the provider signature displayed, showing the note has been saved and signed

Step 8: Review and edit the note

Read through the note in the main progress note field. Make sure it accurately reflects the session, goals, and progress you discussed with your client. Edit or add anything needed to meet your professional standards.

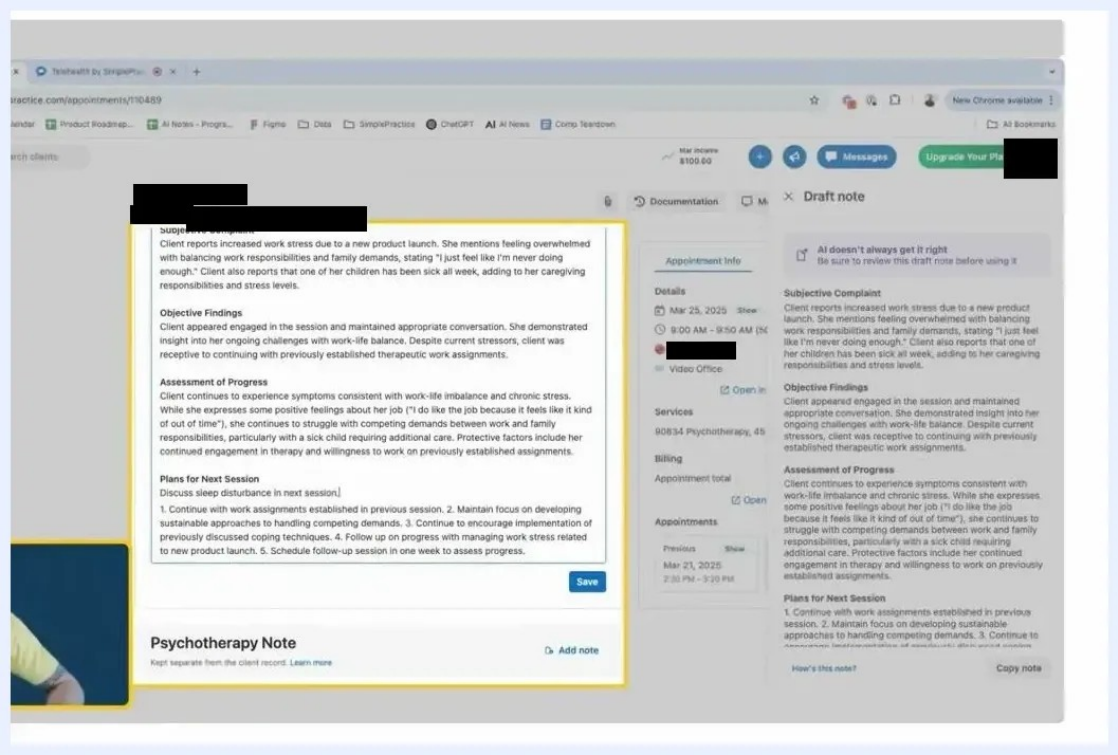


Main progress note field populated with the copied draft note, ready for review and editing

- Use the **Simple Progress Note** dropdown to select the note type.
- Type in the text area to supplement or modify the draft.

Step 9: Add reminders, then save and sign

Enter any reminders or follow-up items in the appropriate section. For example, add "Discuss sleep disturbance in next session" to **Plans for Next Session**.



Progress note with an additional reminder added in the Plans for Next Session section

When the note is ready, click **Save** at the bottom of the progress note field. Then sign the note as your workflow or compliance standards require.

Summary

You now know how to use the AI note taker in SimplePractice to record a telehealth or in-person session and review the generated draft. You also know how to copy it into your progress note, edit it, and save and sign it. The result is accurate, streamlined appointment documentation.