

FORM 07: Client Session Notes Template

From Riz & Oriah:

This form is for **you**, the practitioner—not the client. These are your private notes to document each session. This helps you track client growth, energetic themes, breakthroughs, and patterns over time. It also keeps your sessions ethical, grounded, and repeatable.

We designed this to feel spiritual *and* professional—just like your work.

◆ PRACTITIONER SESSION NOTES TEMPLATE ◆

Client Name: _____

Session Date: _____

Session Type: (e.g., Reading, Energy Work, Coaching, Channeling)

Session Length: _____

INTENTION / FOCUS FOR SESSION

(What the client expressed wanting support with)

ENERGETIC THEMES / INTUITIVE MESSAGES

(What came through—psychic impressions, patterns, symbols, messages, guides, etc.)

CLIENT RESPONSES

(How they received the insights; emotional or energetic shifts observed)

NEXT STEPS / SUGGESTED INTEGRATION

(What you advised or what Spirit guided—journaling, rest, rituals, next sessions, etc.)

YOUR NOTES / AFTERCARE OBSERVATIONS

(Anything for your own tracking—client progress, follow-ups, energy drain, etc.)

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- ☐ Follow-up needed
 - ☐ Energy feels clear
 - ☐ Recommend integration period
 - ☐ Client requested next session: _____
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INSTRUCTOR NOTE TO STUDENTS:

Always keep these notes secure and private. If you're storing them digitally, use password protection or HIPAA-compliant tools if necessary. These notes are a sacred archive of your work—respect them.

Keep your tone loving, neutral, and professional. Avoid venting or overanalyzing the client. This is for clarity, not judgment.