

Therapist Documentation Workflow

Context

User: Licensed therapist.

Surface: In-product onboarding.

Goal: Set up documentation preferences while reinforcing therapist autonomy and compliance boundaries.

Why this matters: Documentation is regulated, high-stakes, and emotionally taxing. The writing must be clear, calm, and respectful of clinical judgment.

1 Screen: Documentation Setup

Title

Set up your documentation workflow

Body

Your notes support continuity of care, regulatory compliance, and your clinical judgment. We'll guide you through a few quick steps to tailor documentation to how you work.

Primary CTA

Continue

Secondary CTA

Save and finish later

2 Screen: Note Timing Preference

Question

When do you usually complete session notes?

Options (radio buttons)

- During or immediately after sessions
- Later the same day
- No preference

Helper text

You can update this anytime in Settings.

Inline Compliance Message

Session notes should reflect your clinical judgment and be reviewed before finalizing. BetterHelp does not modify or approve clinical documentation.

3 Screen: Success State

Confirmation

You're all set.

Subtext

Your documentation preferences have been saved. You can update them anytime as your workflow evolves.