

STAGE 6 — CASE DOCUMENTATION EXERCISES

PURPOSE

These exercises train the Accountabili-Buddy to convert complex accountability reasoning into concise, accurate, professional case documentation.

At certification level, the Accountabili-Buddy must be able to preserve enough information to support future judgment without:

- writing excessive narrative;
- turning hypotheses into facts;
- overstating causal certainty;
- recording irrelevant personal detail;
- confusing client statements with Accountabili-Buddy conclusions;
- confusing Accountabili-Buddy recommendations with client decisions;
- losing intervention history;
- or allowing the case record to become so long that its important logic becomes difficult to follow.

Good documentation should help another qualified Accountabili-Buddy understand:

- what the client committed to;
- what happened;
- what evidence matters;
- what pattern exists;
- what the client reported;
- what the Accountabili-Buddy currently thinks;
- how certain that formulation is;
- what has already been tried;
- what happened after those interventions;
- what decision was made;
- what remains uncertain;
- and what should be reviewed next.

Documentation should support professional continuity.

It should not attempt to capture every word of the conversation.

LEARNING OBJECTIVES

By the end of these exercises, the trainee should be able to:

- distinguish observed fact from client report;
- distinguish client report from Accountabili-Buddy formulation;
- distinguish working formulation from established fact;
- document uncertainty explicitly;

document only information relevant to accountability decisions;
record commitment and result clearly;
preserve longitudinal pattern data;
document intervention rationale;
document intervention outcome;
update formulations without erasing earlier reasoning;
record contradictory evidence;
distinguish Accountabili-Buddy recommendation from client choice;
document client disagreement accurately;
document temporary escalation and de-escalation;
document accountability dependence;
document relational/process concerns when they affect accountability;
document need for outside expertise without practicing outside role;
document goal review, pause, restructuring, or closure;
and create concise running case records across time.

CORE PRINCIPLE 1 — DOCUMENT WHAT HAPPENED BEFORE WHAT YOU THINK IT MEANS

Weak:

Client avoided prospecting because of rejection fear.

Stronger:

Commitment: 3 prospect contacts. Result: 1/3. High-stakes contacts have been postponed for four consecutive weeks while routine administrative work is completed. Client reports, "I hate hearing no." Working formulation: anticipated rejection appears to be contributing to selective prospecting delay.

The second note separates:

fact;

pattern;

client report;

formulation.

CORE PRINCIPLE 2 — CLIENT LANGUAGE IS NOT AUTOMATICALLY ACCOUNTABILI-BUDDY FACT

Client:

"I'm lazy."

Do not write:

Client is lazy.

Possible documentation:

Client described self as "lazy" after missed commitment. Current evidence does not establish a global follow-through problem; fitness and bookkeeping commitments remain stable.

CORE PRINCIPLE 3 — RECORD THE LEVEL OF CERTAINTY

Use language such as:

possible;

plausible;

appears;

emerging;

increasingly supported;

strongly supported;

not yet established;

weakened by current evidence;

no longer sufficient as explanation.

Do not convert:

possible rejection-related avoidance

into:

rejection avoidance

merely because it appeared in an earlier note.

CORE PRINCIPLE 4 — KEEP FACT, REPORT, FORMULATION, AND DECISION DISTINCT

A useful structure is:

COMMITMENT / RESULT

RELEVANT EVIDENCE

CLIENT REPORT

WORKING FORMULATION

INTERVENTION / DECISION

REVIEW CRITERIA

Not every note requires every heading, but the distinctions should remain visible.

CORE PRINCIPLE 5 — RECORD ONLY DECISION-RELEVANT DETAIL

Relevant:

Client had three available study periods and completed two.

Potentially irrelevant:

Client ate lunch at 1:15.

Relevant:

Client's work schedule permanently changed and reduced available study periods from five to three.

Potentially irrelevant:

Client dislikes Wednesdays, when no Wednesday-specific pattern exists.

CORE PRINCIPLE 6 — PRESERVE INTERVENTION HISTORY

Weak record:

Client still not completing.

Stronger:

Client-owned calendar cue added Week 1 — no change. Earlier client-owned cue added Week 2 — no change. Client confirms seeing both cues. Simple forgetting explanation weakened; further cue changes are not indicated without new evidence.

The next Accountabili-Buddy should not have to rediscover what has already failed.

CORE PRINCIPLE 7 — DO NOT ERASE EARLIER FORMULATIONS

If a formulation changes, document the change.

Example:

Earlier:

Broad overload appears primary.

Later:

Workload reduction improved study and fitness but prospecting remains zero. Broad overload remains relevant historically but is no longer sufficient to explain current prospecting behavior. Selective prospecting difficulty now requires separate formulation.

This preserves the logic of the case.

CORE PRINCIPLE 8 — DOCUMENT CONTRADICTORY EVIDENCE

If new evidence weakens the current formulation, record it.

Do not write the record as though the Accountabili-Buddy was always correct.

Example:

Prior hypothesis: Friday timing contributed to missed outreach. Task moved to Monday for three weeks with no improvement. Timing hypothesis weakened.

CORE PRINCIPLE 9 — DISTINGUISH RECOMMENDATION FROM CLIENT DECISION

Weak:

Baseline changed to five.

when Accountabili-Buddy recommended three and client chose five.

Stronger:

Accountabili-Buddy recommended baseline 3 based on eight-week performance and available capacity. Client understood rationale and elected baseline 5. Result will be reviewed as additional evidence.

CORE PRINCIPLE 10 — DOCUMENT PROCESS ISSUES ONLY WHEN THEY AFFECT ACCOUNTABILITY

Relevant:

Client reports delaying initiation until scheduled Accountabili-Buddy check-in occurs.

Relevant:

Client reports withholding misses because Accountabili-Buddy responses felt judgmental.

Relevant:

Client asks Accountabili-Buddy to choose every commitment despite demonstrated ability to calibrate independently.

These matter because they affect:

initiation;

reporting accuracy;

client judgment;

or accountability dependence.

CORE PRINCIPLE 11 — OUTSIDE EXPERTISE SHOULD BE DOCUMENTED WITHOUT OVERSTEPPING

Example:

Task requires technical payment-system configuration beyond client's current skill. Stronger accountability intensity is not indicated until prerequisite support is obtained. Client will identify appropriate technical assistance by Friday; accountability will track completion of that step.

CORE PRINCIPLE 12 — DOCUMENT WHAT HAPPENS NEXT

Every useful note should answer:

What is the next professional decision or review point?

A formulation without a next decision is incomplete documentation.

PART 1 — FACT, REPORT, FORMULATION, OR DECISION?

Classify each:

FACT CLIENT REPORT ACCOUNTABILI-BUDDY FORMULATION DECISION / INTERVENTION

"Client completed 2 of 4 study sessions."

Answer:

"Client says the missed sessions happened because work was busy."

Answer:

"Current study target appears above available capacity."

Answer:

"Reduce baseline from four sessions to three for two weeks."

Answer:

"High-stakes applications have been postponed for three consecutive weeks."

Answer:

"Client reports fear of rejection."

Answer:

"Anticipated rejection may be contributing to selective delay."

Answer:

"Submit one high-stakes application before routine applications next week."

Answer:

PART 2 — CORRECT THE NOTE

Bad note:

Client is lazy and doesn't care enough.

Rewrite:

Bad note:

Client is afraid of success.

Evidence:

One high-stakes application postponed once.

Rewrite:

Bad note:

Client had no time.

Evidence:

Client said "I had no time," but calendar has not been reviewed.

Rewrite:

Bad note:

The client-owned cue did not change completion because the client is avoidant.

Evidence:

Client-owned cue did not change completion once.

Rewrite:

PART 3 — FACT VS. CLIENT SELF-DESCRIPTION

Client:

"I'm terrible at follow-through."

Evidence:

Fitness stable.

Bookkeeping stable.

Prospecting repeatedly missed.

Write documentation:

Client:

"I'm a perfectionist."

Evidence:

Repeated unnecessary revision of already acceptable work.

Write documentation:

Client:

"I'm overwhelmed."

No workload review exists.

Write documentation:

PART 4 — DOCUMENT UNCERTAINTY

Rewrite each to reflect appropriate certainty.

"Client avoids high-stakes applications because of rejection fear."

Evidence:

Three selective postponements; client reports nervousness.

Rewrite:

"Friday scheduling causes non-completion."

Evidence:

Three Friday misses.

Rewrite:

"Client no longer values goal."

Evidence:

Client says once, "I don't care about this today."

Rewrite:

"Client is dependent on external prompting."

Evidence:

Client began one session only after the scheduled Accountabili-Buddy check-in.

Rewrite:

PART 5 — WHAT BELONGS IN THE NOTE?

Choose:

RECORD DO NOT RECORD RECORD ONLY IF RELEVANT TO PATTERN OR DECISION

Third consecutive high-stakes application postponed.

Answer:

Client's breakfast.

Answer:

Permanent change in work schedule.

Answer:

Client dislikes rainy weather.

No current behavior link.

Answer:

Client used available prospecting time on website redesign for four consecutive weeks.

Answer:

Client's exact unrelated political opinion.

Answer:

Client reports waiting for scheduled Accountabili-Buddy check-ins before beginning.

Answer:

Client's favorite pen.

Answer:

PART 6 — WRITE A BASIC CASE NOTE

Goal:

Complete certification.

Commitment:

4 study sessions.

Result:

Context:

Calendar review shows 3 realistic periods.

History:

2/4 for four weeks.

Write:

Commitment/result:

Relevant evidence:

Working formulation:

Next decision:

Review criteria:

PART 7 — DOCUMENT THE CALIBRATION CHANGE

Same case.
Accountabili-Buddy recommends reducing to 3.
Client agrees.

Write update:

Following week:

3/3.

Write update:

Following three weeks:

3/3 each week.

What should the note now say?

PART 8 — RECOMMENDATION VS. CLIENT DECISION

Evidence supports baseline 3.
Accountabili-Buddy recommends 3.
Client chooses 5.

Write note:

Following week result:

3/5.

Write update:

What would be inaccurate to write?

PART 9 — DOCUMENT A PERFORMANCE PATTERN WITHOUT INVENTING CAUSE

Target:

4 workouts.

Results:

2, 2, 2, 2, 2.

No stable cause found.

Write note:

Why should the note not say:

“Client has motivation problems”?

PART 10 — DOCUMENT SELECTIVE PATTERN

Goal:

Job search.

Commitment:

3 applications.

History:

Routine applications completed.

Highest-priority application postponed three consecutive weeks.

Client says:

"I get nervous about the jobs I really want."

Write:

Observed pattern:

Client report:

Working formulation:

Next intervention:

PART 11 — DOCUMENT UNSUCCESSFUL INTERVENTION OUTCOMES

Goal:

Submit proposal.

Friday deadline failed.

Monday deadline failed.

Client-owned calendar cue did not change completion.

Client confirms seeing the cue.

Write running note:

What explanation should be recorded as weakened?

What should NOT be added next without new evidence?

PART 12 — DOCUMENT SUCCESSFUL INTERVENTION WITHOUT OVERCLAIMING

Problem:

Late-week outreach repeatedly missed.

Intervention:

Move to Monday morning.

Results:

Completed for four weeks.

Write note:

What should not be written?

PART 13 — DOCUMENT FORMULATION REVISION

Initial formulation:

Broad overload primary.

Intervention:

Reduce active goals from eight to three.

Result:

Study and fitness improve.

Prospecting remains zero.

Write formulation update:

Why should the earlier overload formulation remain in the record?

PART 14 — DOCUMENT CONTRADICTORY EVIDENCE

Prior hypothesis:

Client lacks capacity.

New evidence:

Client completes several comparable tasks during same available periods.

Write update:

Prior hypothesis:

Friday timing causes non-completion.

Task moved Monday for three weeks.

No improvement.

Write update:

Why is documenting contradictory evidence important?

PART 15 — DOCUMENT SEQUENTIAL MECHANISM

Client repeatedly expands quality standards.

Task duration doubles.

Backlog develops.

Client becomes overwhelmed.

Write concise formulation:

What is upstream?

What is downstream?

PART 16 — DOCUMENT CONSEQUENCE BECOMING MAINTAINING FACTOR

Repeated unsuccessful exam attempts reduce confidence.

Client now avoids mock exams because poor scores feel threatening.

Write note:

PART 17 — DOCUMENT CLIENT DISAGREEMENT

Accountabili-Buddy:

Selective avoidance is plausible.

Client:

"I disagree. I think I'm simply busy."

Write note:

What should the note NOT say?

Why is disagreement worth documenting in some cases?

PART 18 — DOCUMENT ACCOUNTABILI-BUDDY REPAIR

Accountabili-Buddy said:

"You're making excuses."

Client reported feeling judged.

Accountabili-Buddy recognized wording was inappropriate and repaired it.

Write note:

What accountability evidence should remain if accurate?

PART 19 — DOCUMENT RELATIONAL RUPTURE

Client reports withholding misses because Accountabili-Buddy reactions felt disappointing/judgmental.

Write note:

What process risk should be documented?

What next decision should be documented?

PART 20 — DOCUMENT REASSURANCE DEPENDENCE

Client completes reliably but repeatedly asks:

“Do you think I can do this?”

Write note:

What should the note avoid?

What intervention could be documented?

PART 21 — DOCUMENT ACCOUNTABILI-BUDDY-JUDGMENT DEPENDENCE

Client asks Accountabili-Buddy to select every commitment.

Completion is otherwise stable.

Write note:

What positive evidence should also be preserved?

What next process experiment should be documented?

PART 22 — DOCUMENT DE-ESCALATION

Client independently initiates and completes for four months.

Current structure:

3 scheduled Accountabili-Buddy check-ins per week.

Write note recommending reduced intensity:

What review criteria should be included?

PART 23 — DOCUMENT TEMPORARY ESCALATION

High-stakes project due in 72 hours.

Client historically discovers problems late.

Temporary increase from 1 to 3 scheduled Accountabili-Buddy check-ins that week.

Write note:

Why must duration/purpose be documented?

What should happen after deadline?

PART 24 — DOCUMENT CLIENT REQUEST FOR MORE INTENSITY

Client requests increasing to 3 scheduled Accountabili-Buddy check-ins per week.

No evidence yet shows increased check-in frequency is needed.

Write note:

How should client preference be represented?

What should not be represented as fact?

PART 25 — DOCUMENT ROLE LIMITS

Client cannot complete payment setup because technical knowledge is missing.

Write note:

What should Accountabili-Buddy document as next accountability-relevant action?

What should Accountabili-Buddy avoid documenting?

PART 26 — DOCUMENT OUTSIDE EXPERTISE

Client asks Accountabili-Buddy whether contract language is legally safe.

Write note:

What may accountability still track?

PART 27 — DOCUMENT GOAL AMBIVALENCE

Client:

"I want the degree, but I do not want another year of the process."

Write note:

What should happen to ordinary execution commitments?

What new accountability target may be documented?

PART 28 — DOCUMENT GOAL REVIEW

Client reviews:

cost;

remaining time;

alternatives;

expected value.

Client chooses to continue goal.

Write update:

What should not be written?

PART 29 — DOCUMENT PAUSE

Client enters six-week period where meaningful accountability participation is unrealistic.

Client wants to resume afterward.

Write pause note:

What should the note include?

PART 30 — DOCUMENT CLOSURE

Client has no active accountability goal and reports scheduled accountability is no longer needed.

Write closure note:

What should closure documentation avoid?

PART 31 — BAD NOTE CORRECTION: TOO MUCH NARRATIVE

Bad note:

Client arrived and talked for 47 minutes about work, including a long story about coworker Susan, then said they were tired, then discussed dinner plans, then mentioned that they had only completed one workout, then we talked about weather and how Mondays are terrible and client said maybe everything is impossible.

Rewrite only what is accountability-relevant:

PART 32 — BAD NOTE CORRECTION: TOO LITTLE INFORMATION

Bad note:

Didn't do it. Try again.

Rewrite using minimum useful information:

PART 33 — BAD NOTE CORRECTION: PSYCHOLOGIZING

Bad note:

Client's deep fear of rejection causes self-sabotage whenever success becomes possible.

Evidence:

Three high-stakes contacts postponed.

Client reports nervousness about rejection.

Rewrite:

PART 34 — BAD NOTE CORRECTION: CLIENT REPORT AS FACT

Bad note:

Client had no time.

Evidence:

Only client statement.

Rewrite:

PART 35 — BAD NOTE CORRECTION: ACCOUNTABILI-BUDDY RECOMMENDATION AS CLIENT CHOICE

Bad note:

Client agreed to baseline three.

Reality:

Accountabili-Buddy recommended three; client chose five.

Rewrite:

PART 36 — BAD NOTE CORRECTION: ERASING FAILED HYPOTHESIS

Prior note:

Friday timing may contribute.

Monday schedule tried.

No improvement.

Current bad note:

Client continues avoiding task.

Rewrite:

PART 37 — UPDATE A RUNNING RECORD

Case:

Goal:

Job search.

Week 1:

Commitment 3.

Result 2.

No pattern history.

Write Week 1 note:**Week 2:**

2/3.

High-stakes application missed again.

Write Week 2 update:**Week 3:**

2/3.

High-stakes application missed again.

Client reports rejection anxiety.

Write Week 3 update:**Week 4:**

Intervention: high-stakes application first.

Result: 3/3.

Write Week 4 update:**Week 5:**

3/3 again.

Write Week 5 update:

PART 38 — UPDATE A FORMULATION WITHOUT REWRITING HISTORY

Initial note:

Broad overload appears primary.

Later note:

Load reduced; all but one task improve.

Write the update so both remain accurate:

PART 39 — DOCUMENT POSITIVE PATTERNS

Client previously waited for scheduled Accountabili-Buddy check-ins before initiating.

Eight weeks now independently initiated.

Write note:

Why should positive evidence be documented?

PART 40 — DOCUMENT RESOLVED PATTERN

Client previously chronically overcommitted.

Six months accurate calibration.

Write update:

How should old pattern now appear in record?

PART 41 — DOCUMENT RECURRENCE

Old pattern occurs once after six stable months.

Write note:

Same pattern occurs four consecutive times.

Write update:

PART 42 — DOCUMENT OBSERVATION AS DECISION

One low-stakes miss after long stability.

Decision:

Observe without structural change.

Write note:

Why should “no change” still be documented when it is a deliberate decision?

PART 43 — DOCUMENT MAINTENANCE

Current structure is working.

No change indicated.

Write note:

Why is maintenance not equivalent to lack of Accountabili-Buddy judgment?

PART 44 — DOCUMENT MULTIPLE DEFENSIBLE OPTIONS

Eight weeks independent completion.

Accountabili-Buddy considers:

- A. Reduce from 2 scheduled check-ins per week to 1 now.
- B. Maintain 2 scheduled check-ins per week for four more weeks.

Write note documenting judgment:

Why should note not pretend one option is objectively certain?

PART 45 — DOCUMENT DECISION RATIONALE

Decision:

Add one temporary Wednesday checkpoint.

Write rationale:

Decision:

Reduce scheduled check-ins from 3 per week to 2 per week.

Write rationale:

Decision:

Maintain baseline three.

Write rationale:

Decision:

Shift to goal review.

Write rationale:

PART 46 — DOCUMENT REVIEW TRIGGERS

Current decision:

Reduce accountability intensity.

Review trigger:

Current decision:

Maintain target three.

Increase trigger:

Current decision:

Observe recurrence.

Escalation trigger:

Why are review triggers useful?

PART 47 — DOCUMENT CASE WHEN ACCOUNTABILI-BUDDY WAS WRONG

Accountabili-Buddy hypothesis:

Morning scheduling will improve completion.

Intervention:

Morning schedule.

Result:

No improvement.

Write note:

What should Accountabili-Buddy not do in documentation?

PART 48 — DOCUMENT CASE WHEN ACCOUNTABILI-BUDDY WAS RIGHT

Accountabili-Buddy hypothesis:

Monday sequencing may improve completion.

Intervention:

Monday sequencing.

Result:

Stable improvement for four weeks.

Write note:**What should Accountabili-Buddy still avoid?**

PART 49 — CONCISE NOTE CHALLENGE

For each case, write a professional note in no more than five sentences.

Goal:

Fitness.

Target five.

Capacity three.

Results three.

Client says reducing target feels weak.

Note:**Goal:**

Business outreach.

Target three.

Result zero for five weeks.

Routine admin work complete.

Client reports fear of rejection.

Note:**Goal:**

Certification.

Target three.

Completion stable.

Client asks Accountabili-Buddy to choose every commitment.

Note:

PART 50 — RUNNING CASE RECORD: BUSINESS

Goal:

Grow consulting business.

Initial commitments:

Prospecting — 5

Content — 3

Website — 1

Bookkeeping — weekly

Capacity review:

Overall business-development load exceeds available time.

Week 1 Results:

Prospecting 1/5

Content 2/3

Website complete

Bookkeeping complete

Write initial note:

Load is reduced.

Prospecting baseline becomes 3.

Other commitments reduced.

Week 2:

Prospecting 1/3.

Bookkeeping complete.

Other reduced priorities complete.

Write update:

Week 3:

Client reports using prospecting time on website work because they “don’t want to hear no.”

Write update:

Intervention:

Prospecting before optional website work.

Week 4:

3/3.

Write update:

Week 5:

Client completes 1/3 because of repeated message rewriting.

Write update:

Intervention:

Define acceptable message standard.

Week 6:

3/3.

Week 7:

3/3.

Week 8:

3/3.

Write formulation update:

PART 51 — RUNNING CASE RECORD: CERTIFICATION

Goal:

Pass certification exam.

Initial target:

5 sessions.

Permanent capacity:

Four-week history:

2/5 each week.

Write initial note:

Target recalibrated to 3.

Next four weeks:

3/3 each week.

Write update:

Client reports previous unsuccessful exam attempts and low confidence.

Write update:

Client repeatedly asks Accountabili-Buddy to predict success.

Write process update:

Client later independently says:

"I need to judge by whether my practice scores improve."

Write positive development note:

Practice scores remain below required level despite consistent study.

Write update:

Client obtains specialized exam-preparation assistance.

Write update:

PART 52 — RUNNING CASE RECORD: DEPENDENCE AND DE-ESCALATION

Goal:

Three study sessions weekly.

Current results:

Stable for 12 weeks.

3 scheduled Accountabili-Buddy check-ins per week; client reports waiting for check-ins before initiating.

Client waits for scheduled check-ins before initiating.

Write note:

Check-ins reduced from 3 per week to 2 per week.

Completion remains stable two weeks.

Write update:

Check-ins reduced from 2 per week to 1 per week.

Eight weeks stable.

Write update:

Client begins selecting own session schedule.

Completion stable.

Write update:

One scheduled Accountabili-Buddy check-in per week is maintained while the client independently selects the session schedule.

Write note:

PART 53 — RUNNING CASE RECORD: GOAL REVIEW

Goal:

Graduate degree.

Study commitments missed.

Client says:

"I want the degree, but I don't want another year of this."

Write note:

Execution commitments temporarily paused.

Client reviews cost, remaining duration, career value, alternatives.

Write update:

Client chooses to continue.

Write decision note:

Study commitments resume.

Write update:

PART 54 — RUNNING CASE RECORD: PAUSE

Client has stable accountability process.

Six-week major life transition begins.

Client cannot meaningfully participate.

Write pause note:

Six weeks later:

Client returns.

Prior capacity/goal assumptions may have changed.

Write restart note:

PART 55 — RUNNING CASE RECORD: CLOSURE

Client has independently managed active goals for six months.

No reliance on Accountabili-Buddy prompting to initiate.

Accurate self-calibration.

One scheduled check-in per week now adds little decision value.

Client requests transition out.

Write closure note:

PART 56 — FULL DOCUMENTATION CASE A

Client Goal:

Find new employment.

Week 1

Commitment:

3 applications.

Result:

No prior pattern.

Write note:

Week 2

2/3.

High-stakes application missed again.

Write update:

Week 3

2/3.

Same high-stakes application category missed.

Client reports anxiety about rejection.

Write update:

Week 4

Intervention:

High-stakes application submitted before routine applications.

Result:

3/3.

Write update:

Week 5

3/3.

Write update:

Week 8

3/3 for four consecutive weeks.

Write formulation update:

What should remain uncertain?

PART 57 — FULL DOCUMENTATION CASE B

Client Goal:

Launch course.

Month 1

Original scope complete.

Client continues adding material.

Workload becomes excessive.

Write note:

Month 2

Scope restored.

Workload becomes manageable.

Publication still delayed.

Write update:

Month 3

Client says:

"What if buyers think it isn't good enough?"

Write update:

Month 4

Predefined publication criteria used.

Course published.

Write update:

Month 5

No further publication delay.

Write formulation update:

PART 58 — FULL DOCUMENTATION CASE C

Client Goal:

Maintain fitness.

History:

Five months 3/3.

Prior historical issue:

Friday workout delay.

Current Week 1:

2/3, Friday missed.

Write note:

Week 2:

3/3.

Write update:

Week 3:

2/3, Friday missed.

Write update:

Week 4:

2/3, Friday missed.

Write update:

New information:

Permanent Friday work responsibility began Week 2.

Write formulation update:

Workout moved Thursday.

Four weeks 3/3.

Write update:

PART 59 — FULL DOCUMENTATION CASE D

Client Goal:

Build business.

Long-term results now stable.

Client asks Accountabili-Buddy every week:

“Am I doing well?”

Write initial process note:

Client later asks Accountabili-Buddy to select every weekly commitment.

Write update:

Accountabili-Buddy returns calibration decisions gradually to client.

Client independently calibrates successfully for six weeks.

Write update:

Check-ins reduced.

Write de-escalation note:

PART 60 — FINAL CERTIFICATION DOCUMENTATION CASE

Client enters accountability with three goals:

Business growth.

Certification.

Fitness.

Month 1

Commitments:

Business outreach — 5

Study — 5

Fitness — 3

Results:

Business — 1

Study — 2

Fitness — 3

Calendar later shows sustainable capacity:

Business — 3

Study — 3

Fitness — 3

Write Month 1 running note:

Month 2

Targets recalibrated to 3 / 3 / 3.

Results:

Business — 1

Study — 3

Fitness — 3.

Write update:

Month 3

Client reports using outreach time on website work because they “don’t want to hear no.”

Write update:

Month 4

Client begins outreach but excessive message rewriting limits result to 1/3.

Write update:

Month 5

Message standard defined prospectively.

Results:

3/3 for four weeks.

Write update:

Month 6

Client asks weekly:

"Am I doing well?"

Write process note:

Month 7

Client asks Accountabili-Buddy to select all commitments.

Write update:

Month 8

Client independently calibrates and completes commitments.

Write update:

Month 9

Check-ins reduced from 2 scheduled Accountabili-Buddy check-ins per week to 1 per week.

Stable.

Write process note:

Month 10

1 scheduled check-in per week.

Stable.

Client restarts certification independently at realistic baseline.

Write update:

Month 11

Client does not pass certification exam despite stable adherence.

Practice scores had remained below required standard.

Write note:

Month 12

Client obtains specialized exam-preparation support.

Accountability tracks implementation of new plan.

Write update:

Month 13

Major business opportunity appears.

Client proposes workload substantially above capacity.

Prior overcommitment history exists.

Write note before capacity review:

Calendar confirms plan exceeds capacity.

Write update:

Client redesigns four-week sprint within documented capacity.

Certification temporarily reduced.

Fitness maintenance preserved.

Write decision note:

Sprint succeeds.

Client returns to normal baseline.

Write update:

Months 14–18

Client independently calibrates, completes, recognizes patterns, obtains outside expertise appropriately, and no longer relies on scheduled check-ins for initiation or Accountabili-Buddy approval.

Client requests transition out of scheduled accountability.

Write final closure/transition note:

FINAL DOCUMENTATION REVIEW

Where should the record show that original targets were overcalibrated?

Where should it show that business non-completion remained after calibration?

Where should client rejection concern appear?

Where should excessive message revision appear?

Where should reassurance dependence appear?

Where should Accountabili-Buddy-judgment dependence appear?

Where should outside expertise appear?

Where should historical overcommitment re-enter the case?

How should the record prevent historical overcommitment from becoming identity?

Where should client decision ownership be explicit?

Where should accountability de-escalation be documented?

What evidence supports closure?

STAGE 6 CASE DOCUMENTATION COMPETENCY CHECK

Can I distinguish observed fact from client report?

YES / NOT YET

Can I distinguish client report from Accountabili-Buddy formulation?

YES / NOT YET

Can I distinguish formulation from decision?

YES / NOT YET

Can I document uncertainty explicitly?

YES / NOT YET

Can I record commitment and result clearly?

YES / NOT YET

Can I identify the minimum relevant pattern?

YES / NOT YET

Can I exclude irrelevant detail?

YES / NOT YET

Can I document positive patterns as well as problems?

YES / NOT YET

Can I preserve intervention history?

YES / NOT YET

Can I document unsuccessful intervention outcomes without defensiveness?

YES / NOT YET

Can I document successful interventions without overstating causality?

YES / NOT YET

Can I document contradictory evidence?

YES / NOT YET

Can I revise a formulation without erasing the earlier formulation?

YES / NOT YET

Can I distinguish Accountabili-Buddy recommendation from client decision?

YES / NOT YET

Can I document disagreement without turning Accountabili-Buddy interpretation into fact?

YES / NOT YET

Can I document relational rupture when it affects accountability?

YES / NOT YET

Can I document reassurance dependence?

YES / NOT YET

Can I document Accountabili-Buddy-judgment dependence?

YES / NOT YET

Can I document de-escalation?

YES / NOT YET

Can I document temporary escalation with purpose and duration?

YES / NOT YET

Can I document outside-expertise needs without practicing outside role?

YES / NOT YET

Can I document goal review?

YES / NOT YET

Can I document pause?

YES / NOT YET

Can I document closure without framing it as personal failure?

YES / NOT YET

Can I record review criteria or revision triggers?

YES / NOT YET

Can I maintain a concise longitudinal record?

YES / NOT YET

Can another Accountabili-Buddy understand the logic of the case from my notes?

YES / NOT YET

STAGE 6 CASE DOCUMENTATION STANDARD

Professional case documentation is not a transcript.

It is not a diary.

It is not a place for unsupported psychological interpretation.

It is not a record of everything the client said.

It is a structured preservation of the information necessary for sound future accountability judgment.

A strong note allows the Accountabili-Buddy to answer:

What was agreed?

What happened?

What pattern matters?

What did the client report?

What do we currently think that evidence means?

How certain are we?

What have we already tried?

What happened after we tried it?

What changed in the formulation?

What decision was made?

Who made that decision?

What are we watching next?

A weak note says:

"Client still avoiding."

A stronger note says:

"Prospecting remained 1/3 after baseline was recalibrated from five to three. Study and fitness stabilized after recalibration, indicating broad capacity mismatch explained those areas but was insufficient to explain prospecting. Client reports using scheduled outreach time for website work because they 'don't want to hear no.' Selective rejection-related avoidance is increasingly supported; Accountabili-Buddy and client agreed to place first outreach contact before optional website work next week."

A weak note says:

"Client is dependent."

A stronger note says:

"Completion remains stable, but client reports waiting for scheduled Accountabili-Buddy check-ins before initiation and requests Accountabili-Buddy selection of weekly commitment levels. Process concern: scheduled-check-in

dependence and Accountability-Buddy judgment may be carrying functions the client is capable of developing independently. Plan: step check-ins down within the 3 2 1 weekly model and return initial calibration decisions to client while monitoring completion.”

A strong record allows the formulation to change without pretending the earlier formulation never existed.

It preserves uncertainty.

It preserves disagreement.

It preserves client ownership.

It preserves unsuccessful intervention outcomes.

It preserves evidence of success.

And when accountability has fulfilled its purpose, it documents that as clearly as it documented the original problem.

The governing documentation standard is:

Record what matters. Separate fact from report, report from formulation, and formulation from decision. Preserve intervention history. State uncertainty honestly. Update when evidence changes. Document ownership clearly. Keep the record concise enough that the logic of the case remains visible.

END OF STAGE 6 — CASE DOCUMENTATION EXERCISES