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May 23, 2025

To Whom It May Concern:

This letter is in reference to Sonia Montero.

In June of 2024, Sonia sought counseling services at the clinic in which I work, and began attending recurring sessions with me in July of 2024. Since then, she has consistently participated in bi-weekly counseling sessions wherein she has demonstrated openness and motivation toward change. During our time working together, Sonia has demonstrated increasingly positive shifts in her mindset and thinking patterns. More importantly, she exhibits an ongoing commitment to sobriety, mental health, and overall wellbeing through her actions. Despite facing a variety of challenges throughout the last year, Sonia has shown time and again that she is invested in, and committed to, improving herself and maintaining sobriety.

If there are any questions regarding Sonia's participation in services, please reach out to me via phone or email (608-960-8484, psoenlein@abegglencounseling.com). In order to communicate directly, a Release of Information form must be completed and signed by Sonia approving this communication.

Sincerely,

A handwritten signature in cursive script that reads "Paula Soehnlein".

Paula Soehnlein, LPC, LMHC, NCC
Abegglen Counseling

**ARC OUTPATIENT SERVICES, INC.
TREATMENT PLAN REVIEW AND ASAM**

LEGAL NAME: Sonia Montero PREFERRED NAME: Sonia
PRONOUNS: She, Her, Hers DOB: [REDACTED]
CURRENT DIAGNOSES: alcohol use disorder, mild F10.10, Generalized Anxiety Disorder, Depression
DATE OF REVIEW: 3/27/2024

Treatment Goals:

1. Maintain abstinence from all substances for 30 days

Client Strengths: motivated to change, determination

Type of Goal: 1. SUD and Recovery Status: 3. Not Achieved, Continue Stage of Change: Preparation

Established on: 10/25/2023 Target Date: 12/1/2023

Completed on: 12/1/2023 Measurement: Client Self Report

Objective: Client will weigh the pros and cons of alcohol use

Established on: 10/25/2023 Target Date: 12/1/2023

Completed on: 12/1/2023 Measurement: Review of Documentation

Action: Complete a decisional balance worksheet

Established on: 10/25/2023 Target Date: 12/1/2023

Completed on: 12/1/2023 Measurement: Review of Documentation

Action: Read and discuss NIAA Rethinking Drinking information

Established on: 10/25/2023 Target Date: 12/1/2023

Completed on: 12/1/2023 Measurement: Clinical Observations

Brief Summary of Progress Towards Goal: Client has met all of her goals related to her alcohol use and is highly motivated to continue with a sober lifestyle. Client is able to express the pros and cons of her use and identify the ways in which her use did not align with her goals and values. Client has a positive support system and is able to engage in activities with her friends that do not revolve around alcohol use. Client does have some concerns about her partner's use as she says he rarely drinks, but when he does, she feels his use is problematic. Client has been able to set boundaries with her partner and he has made some effort to embrace a sober lifestyle with her by trying NA drinks and joining her in some of her new hobbies (puzzles, exercise). Client has maintained abstinence since starting treatment services. While client feels a deep sense of regret about her most recent OWI, she feels this was a much needed wake-up call for her and has demonstrated a strong

commitment to changing her relationship with alcohol. Update 3/27/2024- client has a positive attitude about her current house arrest and is taking the time to accomplish projects at home. Client and her partner have adopted a healthier lifestyle since abstaining from alcohol use and reports their relationship has grown stronger as a result.

2. Learn and practice healthy coping skills for managing life stressors and anxiety

Client Strengths: open-minded, willing to try new things

Type of Goal: 2. Mental Health Status: 2. Partially Achieved, Continue Stage of Change: Action

Established on: 10/25/2023 Target Date: 12/15/2023

Completed on: 12/26/2023 Measurement: Client Self Report

Objective: Client will reduce symptoms of anxiety and depression as measured using PHQ-9 and GAD-7 assessments

Established on: 10/25/2023 Target Date: 1/1/2024

Completed on: 12/26/2023 Measurement: Review of Documentation

Action: Client will start treatment with a mental health provider for ongoing mental health support

Established on: 10/25/2023 Target Date: 1/1/2024

Completed on: Measurement: Collateral Contacts

Action: Client will identify 10 effective coping strategies and use them to manage situations that trigger anxiety and substance use cravings.

Established on: 10/25/2023 Target Date: 1/1/2024

Completed on: 12/26/2023 Measurement: Client Self Report

Brief Summary of Progress Towards Goal: Client reports significant improvement in her mental health symptoms since starting treatment and has developed several helpful coping strategies, including yoga, reading, puzzles, and breathing exercises which she puts into practice regularly. Client is currently waitlisted for a mental health provider and plans to call some other providers to see if she can find a place with a shorter waitlist.

3. Client will learn about setting boundaries and practice these in her interpersonal relationships

Client Strengths: willingness to learn, strong sense of values

Type of Goal: 3. Relationship/Family Status: 3. Not Achieved, Continue Stage of Change: Contemplation

Established on: 10/25/2023 Target Date: 1/1/2024

Completed on: 12/26/2023 Measurement: Clinical Observations

Objective: Client will prioritize self-care and know her limits when it comes to helping others

Established on: 10/25/2023 Target Date: 1/1/2024

Completed on: 12/26/2023 Measurement: Client Self Report

Action: Complete boundary self-assessment worksheet

Established on: 10/25/2023 Target Date: 1/1/2024

Completed on: 12/12/2023 Measurement: Review of Documentation

Action: Complete homework from Better Boundaries workbook

Established on: 10/25/2023 Target Date: 6/1/2024

Completed on: Click or tap to enter a date. Measurement: Review of Documentation

Brief Summary of Progress Towards Goal: Client has worked with writer to learn about boundaries and areas where she has loose boundaries, primarily with her brother, partner, and at work. Client has been practicing setting boundaries and prioritizing her needs by saying no to extra shifts and agreeing not to help her brother except when it comes to being there for her nephews and providing him with resources. Client has also asked her partner to stay at his place on nights he chooses to drink as client says he acts obnoxious and she doesn't like being around him. Client plans to continue treatment once a month to work on developing better boundaries until she finds a mental health provider. Update 3/27/2024- client is continuing to refrain from any contact with her brother as she recognizes having a relationship with him is detrimental to her mental health currently. Client and her partner are committed to abstaining from alcohol use and client shows a strong commitment to a healthier lifestyle, valuing exercise and putting energy into relationships with those who share her values. Client and writer discussed grounding techniques and breathing exercises to use when coping with feelings of anxiety and uncomfortable emotions on 3/27. Client and writer are meeting monthly and writer plans to assist client in finding a mental health provider during next session.

| ASAM REVIEW | | | | | |
|------------------|------------------|----------------|------------------|----------------|------------------|
| Dimension 1 | Dimension 2 | Dimension 3 | Dimension 4 | Dimension 5 | Dimension 6 |
| 0 - Non-clinical | 0 - Non-clinical | 1 - Outpatient | 0 - Non-clinical | 1 - Outpatient | 0 - Non-clinical |

Client Signature and Date:

Counselor Signature and Date: 3/27/2023

Heidi Phistry- SAC *Heidi Phistry*

Supervisor Signature and Date:

Medical Director Signature and Date: 1/25/24

 , MS, CSAC, LPC, 2/16/2024

 , MD, Medical Director

**ARC OUTPATIENT SERVICES, INC.
DISCHARGE SUMMARY**

LEGAL NAME: Sonia Montero PREFERRED NAME: Sonia
PRONOUNS: She, Her, Hers DIAGNOSES: alcohol use disorder, mild, in early remission F10.21, Generalized Anxiety Disorder, Major Depressive Disorder

Date: 7/5/2024

Reason for Discharge: Completed treatment with major improvement (1)

Prognosis: Good

Attendance: Good

Client Ability to Return: Yes

Treatment Goals:

1. Maintain abstinence from all substances for 30 days

Type of Goal: 1. SUD and Recovery Status: 1. Achieved Stage of Change: Maintenance

2. Learn and practice healthy coping skills for managing life stressors and anxiety

Type of Goal: 2. Mental Health Status: 1. Achieved Stage of Change: Maintenance

3. Client will learn about setting boundaries and practice these in her interpersonal relationships

Type of Goal: 3. Relationship/Family Status: 1. Achieved Stage of Change: Maintenance

Summary of Treatment: Client showed a high level of internal motivation to change her relationship with alcohol and cope with various life stressors in healthy ways. Client was able to incorporate new daily habits, such as exercise and reframing negative self-talk, as well as set boundaries with those in her life that were draining her energy and affecting her mental health negatively. Client made significant changes that resulted in an increase in feelings of self-worth and has been successful in creating a life that aligns with her core values. Client completed all of her treatment goals at ARC and transitioned to a mental health provider in order to further her personal growth and address her mental health goals.

Continuing Care Plan:

What are your goals for the next year: [Click or tap here to enter text.](#)

What strengths do you have that will help you reach these goals: [Click or tap here to enter text.](#)

Is there anything that we at ARC could have done better: [Click or tap here to enter text.](#)

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| ASAM REVIEW |
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| Dimension 1 | Dimension 2 | Dimension 3 | Dimension 4 | Dimension 5 | Dimension 6 |
|------------------|------------------|------------------|------------------|------------------|------------------|
| 0 - Non-clinical |

Client Signature and Date:

Supervisor Signature and Date:

Counselor Signature and Date:

Heidi Phistry Heidi Phistry, BS, SAC 7/5/2024

Medical Director Signature and Date:
