

# Tips For Provider Progress Notes

## General Principles

**Progress notes must relate to the individual's goals and to the services the provider agrees to deliver as listed in the Service Agreement.**

Relate the progress note back to both the goal and what's listed under the "How Will My Provider Help Me Achieve My Goals" section of the Service Agreement. This means that the goals should be stated on the progress notes each month so that the goals are accurately reflected in the descriptions of supports provided.

**Progress notes need to highlight the *disability-related supports* that were provided to the customer.**

It is okay to provide a narrative of activities the customer has participated, but the disability related supports provided are key.

**It is important to have the provider be the subject of at least part of the progress note.**

A progress note that only talks about the customer is not one that has illustrated what supports the provider or agency staff has supplied to the customer.

**Progress notes should be written for someone who does not know the customer.**

Many people will see the progress note. Some, such as auditors, will not know the customer. If the progress note is written with the assumption that the reader knows the customer, there will probably be insufficient detail in the progress note to illustrate the services that were provided.

**Progress notes should be based on fact or observation, and not include staff opinion unless expressly stated as such.**

Notes can include statements like "In staff's opinion Beth seemed happy because she was laughing and clapping her hands," but not statements like "Beth really enjoyed the outing."

**Progress notes should change from month to month.**

While many of the supports you provide to a customer are the same from month to month, it is expected that you do different things each month with customers based on a host of factors (see next point). Progress notes that are either exactly the same or simply paraphrased from one month to the other are not acceptable as they do not communicate the unique and individual work you do with each customer each month. It is important to remember to detail ongoing support needs that remain the same or similar from month-to-month are significant pieces of information that chronicle the need for continued support.

**Understand that you provide many, many services and supports to your customer each month.**

For many providers these supports are in some ways 'automatic' and it takes some thinking to realize and list all of the supports you provide to your customers each month.

### **Examples of good progress notes:**

Tess continues to work well on her own and is able to complete up to four steps in a task. Staff supported Tess by setting up work projects, giving her instructions and performing quality control on her work. When she completes a project, she needs staff to assist her in removal of the prior task and set up of a new task. She can be counted on to have high productivity and a good attention span. Staff recorded only 2 seizures this month, both were short and Tess just needed a small nap after each.

Bub participated in many activities this month. He was able to plant a seed during our Earth Day Celebration with hand over hand assistance from staff. Staff continue to need to redirect him with verbal prompts when he gets upset or frustrated. He did not have any incidents in the past month of aggression toward others. Staff believe this is due to moving him to a different work area from another customer (SP) whom he often targets with his aggression.

### **Examples of not so good progress notes:**

Helen had a good month. She went bowling, to Taco Bell, McDonalds and to the park several times. She played games with her peers and really enjoys this. She had some of her usual behaviors, but they weren't as bad as they could be. She really enjoyed coming to the program and likes it very much.

Dan worked 12 days this past month on paid work. He worked on rice containers, large garbage bags and plastic flowers. He spent a significant amount of time complaining about having to work and resisting the location of his work assignments. He was very loud and disruptive to those around him.