

# General Principles for Documenting Supports and Eligibility for Reimbursement

## **Progress notes must relate to the individuals goals and to the services the provider agrees to deliver 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.

- What is the customer able to do independently and what are their strengths? What do they need your assistance with? On-going assessment of a person's skill is a crucial piece to the service you are providing.
- How have things changed? Have you seen progress? If so, what are some examples? If not, what are the barriers?
- What methods and strategies do you use to facilitate the customer's involvement, independence and progress?

## **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.

- What behavior inhibits the customer's independent participation in their chosen activity? Trouble remembering things, lack of self-awareness, lack of self-control, anger management problems, etc.
- What are the indicators that this person requires support? They have no friends, they are not able to create their own grocery list, they allow people into their homes that they don't want there, etc.
- How is this person's ability to engage in the chosen activity independently affected by their disability?
- What specifically are you doing to facilitate the customer's interaction with their chosen activity?
- Why does the customer need you there? What would happen if you weren't there?
- What works for the customer (demonstration, discussion, verbal cueing, etc)? What doesn't?
- What does this person do independently? Have you seen progress and what are some examples of this progress?

## **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 has supplied to the customer. Describe your interactions, your presence and how you facilitated the customer's participation.

## **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 fact or observation based 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.

## **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.