

## Sample Chart Documentation: Progress Notes

Agencies may have their own specific guidelines for writing progress notes that reflect activities conducted with a client or on their behalf. Here are some sample progress note entries. Progress notes should tell a story. For instance, if there is a two-month gap in notes, the person reading the chart should be able to understand the reason for the gap in services. Also, note writing should be simple, because we won't want employment specialists spending more time than necessary working on paperwork, however, they should include the location of the service, duration of service and description of services provided.

Programs can augment progress notes by including client-specific employer contact logs in the chart.

Finally, these notes were not written in a way to demonstrate the medical necessity of the service. If your agency is billing some services to Medicaid, please contact your state Medicaid office to talk about requirements for Medicaid notes.

### SAMPLE NOTES BY EMPLOYMENT SPECIALIST FOR GEORGE W.

Date: 1/23/20                      Duration: 0 minutes                      Location: phone

Client: George Washington

Attempted to call George to set up first meeting. Left message.

Sarah Swanson  
Sarah Swanson

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Date: 1/25/20                      Duration: 0 minutes                      Location: phone

Client: George Washington

Attempted to call George. Left message.

Sarah Swanson  
Sarah Swanson

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Date: 1/28/20                      Duration: 10 minutes                      Location: Office

Client: George Washington

Attended the last 10 minutes of George's case management appointment. George is definitely interested in work and we scheduled an appointment for 2/4/20. Also agreeable to referral to VR. George signed release of information for VR.

Sarah Swanson  
Sarah Swanson

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Date 2/4/20

Duration: 60 minutes

Location: coffee shop

Client: George Washington

Met with George to learn more about his work interests, work history and goals for employment. George has a history of working in landscaping but is interested in some type of work that would be year round. He has also done some janitorial work but reports that it was just “ok”. George would be interested in learning more about other kinds of jobs. (Please see the vocational profile for more details.) George is close to his family, especially his mother, and would like to have her involved in his employment plan. Writer will attempt to schedule an appointment with George and his mother next week.

Sarah Swanson  
Sarah Swanson

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Date: 2/12/20

Duration: 70 minutes

Location: mother’s home

Client: George Washington

Met with George and his mother at her home. George’s mother (Alice Miller) is happy that George will be returning to work since she thinks he would benefit from being around people during the day. Alice is also concerned because the last time George worked, he got into an over payment situation with Social Security. George agreed that he would like to work part-time and maintain his benefits, for now. Both liked the idea of meeting with a benefits planner. Writer will call the benefits planner to let her know that George and Alice will be calling to set up an appointment. (See release of information in chart for the Work Incentives Center.) Alice reported that George is a hard worker and did very well on the landscape job but had difficulty with the janitorial job because he was hearing voices through the radio. George reported that he has been thinking some more about the type of job he would like. He is interested in learning more about driving jobs. We talked about various types of driving jobs and the one that George was most interested in was driving auto parts from one store to another. Alice observed that George could control the radio in a car but expressed concern that George sometimes has trouble with concentration and might get lost. Writer suggested that she could provide help with that, if needed. For example, if George only needed to learn a few routes, they could do that together before he started the job. Please see vocational profile for additional information gathered during this appointment.

Sarah Swanson  
Sarah Swanson

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Date: 2/12/20

Duration: 5 minutes

Location: phone

Client: George Washington

Phone call to Bob Clinton at Work Incentives Center. I let him know that George is part of our IPS program and will be calling to set up an appointment for himself and his mother. Bob is happy to work with them.

Sarah Swanson

Sarah Swanson

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Date: 2/14/20

Duration: 90 minutes

Location: VR Office

Client: George Washington

Meeting with George and his new VR counselor, Amy Thomas. Helped George with VR paperwork and also participated in meeting to talk about George's current job interests, etc. He would like to learn more about auto parts delivery. Writer will set up an informational interview with an employer she knows at Auto World. George signed release of info for Auto World. George reports that he and his mother have an appointment to meet with the benefits person next week. Amy suggested other types of delivery jobs, such as delivering baked goods to stores from Garber Goodies. The newspaper also pays slightly above minimum wage for delivery people who use their own cars—George will consider that option. Additional information added to voc profile. Amy will meet with us again after George visits a couple of employers to learn more about jobs in which he may be interested.

Sarah Swanson

Sarah Swanson

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Date: 2/20/20

Duration: 45 minutes

Location: coffee shop

Client: George Washington

Met with George to talk some more about his employment plan. Reviewed detailed information about work history, talked about how George spends his days, his health etc. (see voc profile in chart). George is definitely interested in having writer contact employers on his behalf (see "plan for approaching employers" in chart).

Sarah Swanson

Sarah Swanson

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Date: 2/21/20

Duration: 20 minutes

Location: phone

Client George Washington

Spoke to Paul Davis at Auto World about an informational interview. He is happy to do that on 2/26/20.

Call to George to tell him about the appointment and to talk about questions that he might want to ask about auto parts delivery jobs. George wrote down some of the questions we came up with. We'll meet 10 minutes before the appointment to review.

Sarah Swanson

Sarah Swanson

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Date: 2/26/20

Duration: 55 minutes

Location: Auto World

Client: George Washington

Met with George in the parking lot to review what we want to get out of the appointment, reviewed questions to ask employer. George did a great job during the meeting—asked his list of questions and also had some follow-up questions. Spoke together briefly after the appointment. George is definitely interested in this type of work. He would like to go ahead and apply at Auto World, even though they currently don't have openings.

Phone call to VR counselor, Amy. She'll start working with George on a job search plan.

Sarah Swanson

Sarah Swanson

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Date: 3/2/20

Duration: 85 minutes

Location: One Stop

Helped George gather addresses and dates for previous employers, as well as contact information for references. We then worked together on the online application for Auto World. Writer and George will get together to call Paul at Auto World in two days to let him know that George has applied for the job and is interested in working for Auto World. We will also apply at Brimstone Tires for a similar job. George reports that he and his mother met with Bob at Work Incentives Center and he found out that a job with relatively regular hours will help him avoid an overpayment. Bob explained that the reason he had trouble last time was that he did not keep SSA informed of changes in earned income when doing the landscaping job. Still wants part-time work for now.

Sarah Swanson

Sarah Swanson

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#### SAMPLE PROGRESS NOTES BY EMPLOYMENT SPECIALIST FOR ESTER W.

Date: 7/3/20

Duration: 20 minutes

Location: car

Client: Esther Williams

Met with Esther to talk about her new job while giving her a ride to work. Reports that she is nervous about her first day and did not sleep well last night. Reviewed some things she can do to try to relax, also that she can call writer's cell phone if she needs to. Said she drank about six beers last night—tried to keep it to a smaller amount since she was working today but it was difficult because she was nervous. This writer encouraged her to discuss with case manager ways to manage her nervousness and not rely on alcohol.

Sarah Swanson

Sarah Swanson

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Date: 7/4/09

Duration: 20 minutes

Location: car

Client: Esther Williams

Took Esther to work so we could talk about her first day. Esther reports that she was “a nervous wreck”. Spent some time working on paperwork and then started training on cash register. Said the register was very difficult and she is worried that she won't be able to learn it. Writer asked if she received any written material they could study together—she will ask for some today. Esther will try to drink no more than four beers tonight.

Sarah Swanson

Sarah Swanson

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Date: 7/5/20

Duration: 20 minutes

Location: car

Client: Esther Williams

Went to Esther's home to take her to work. Reports she is very nervous about work today and learning the cash register. Esther did not ask for written material to study because she does not want the employer to think she is “stupid”. Does not think she did well with learning the register. Writer reminded Esther that she is available to help by talking to the employer or even going to work with Esther. Esther will think about it.

Sarah Swanson

Sarah Swanson

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Date: 7/7/20

Duration: 10 minutes

Location: phone

Client: Esther Williams

Phone call from Esther saying that she is no longer employed. Esther walked off the job because she felt overwhelmed and did not think she would be able to learn the job. Said her employer made comments that she wasn't fast enough. Writer suggested that Esther may feel bad about the job but it is great that she got hired and gave it a try. Plan is to

meet with Esther tomorrow to talk some more about her experience and also to think about another job.

Sarah Swanson

Sarah Swanson

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Date: 7/8/20

Duration: 0 minutes    Location: Esther's home

Client: Esther Williams

Esther was not home for the appointment. Tried calling Esther later in the day and left a message.

Sarah Swanson

Sarah Swanson

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Date: 7/9/20

Duration: 0 minutes

Location: phone

Client: Esther Williams

Tried calling Esther—left a message.

Sarah Swanson

Sarah Swanson

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Date: 7/12/20

Duration: 0 minutes

Location: phone

Client Esther Williams

Case manager reports that Esther missed his appointment yesterday. Tried calling Esther and left a message.

Sarah Swanson

Sarah Swanson

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Date: 7/19/20

Duration: 15 minutes

Location: office

Client: Esther Williams

Saw Esther before her appointment with her psychiatrist (unscheduled meeting). Esther reports that she felt very discouraged and embarrassed when the job didn't go well. Writer encouraged Esther to think about another job—that she has a great, outgoing personality and that we could think of jobs that would use her social skills but not require working on a cash register. Spoke about jobs such as hostess, working at a deli counter, or working at the information booth at the airport. Esther began to perk up and agreed to meet next week.

Sarah Swanson  
Sarah Swanson

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9/4/09