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

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

Client: George Washington

Attempted to call George. Left message.

Sarah Swanson
Sarah Swanson

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.