

THE WORKPLACE LITERACY PROJECT



Creating exemplar progress notes with guidelines - Trainer guide

Includes session plan and trainer prompts

Last revised 4 March 2017

Session objectives

At the end of the session, learners will understand more about progress notes. The team will also have some draft exemplars and guidelines that they can use in the future.

Resources required

- Whiteboard, markers and eraser
- Timer
- 'Creating exemplar progress notes with guidelines – trainer guide' a copy for the trainer (this document)
- 'Creating exemplar progress notes with guidelines – workbook' a copy for each learner
- Pens for learners
- Highlighters
- Name tags
- Evaluation forms

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Duration

1½ hours

Learner group

Disability Support Workers

Context

To be held during team meeting or as a stand-alone training session.

NOTE

Each session needs to have someone from the organisation attend who can confirm the content that needs to be included in progress notes.

Session Plan

Time	Focus	Aim	Activity	Grouping	Resources
5	Introduction	Learners understand that they will develop exemplars and guidelines during this session.	Discussion	Whole group	Workbook p1
5	Introduction to exemplars	Learners understand the purpose of exemplars and guidelines, and have an idea of what they might include.	Discussion	Whole group	Workbook p2-3
5	Overview of process	Learners understand that there will be a structured process to follow. This workshop will only take them up to Step 6.	Discussion	Whole group	Workbook p5
5	Purpose and audience	Learners understand: <ul style="list-style-type: none"> • Why progress notes are used • Who reads progress notes 	Discussion and writing	Whole group	Whiteboard Workbook p6 Trainer prompts
5	Required content of progress notes	Learners understand the information that is needed in progress notes for their organisation.	Discussion and writing	Whole group	Whiteboard Workbook p7 Trainer prompts
30	Draft exemplars Make notes about guidelines	Learners draft at least two exemplars for a fictitious person. Learners understand and include information about active support and objective writing as relevant.	Discussion and writing	Whole group	Workbook p8, 12-15
30	Draft guidelines	Learners draft guidelines that can be applied to progress notes.	Discussion and writing	Individual and whole group	Workbook p9
5	Close	Learners understand that the team leader will come back to them with the finalised documents.	Discussion	Whole group	Workbook p11



Trainer prompts for page 6

The purpose of writing progress notes is:

- To record events and activity
- To communicate information with the team
- To provide evidence of events, which may be used in an investigation
- To demonstrate what the organisation is doing to assist the person to meet the goals in their individual plan
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The progress notes will be read and used by:

- The person being supported
- The person's family and/or carers (with appropriate permission)
- Case managers
- Team members
- Team leaders
- Key workers
- Senior practitioner
- Allied health clinicians
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Trainer prompts for page 7

The information we need to include in progress notes is:

- The activity the person undertook in relation to their plan
- Any unusual events or activity
- The person's level of participation
- The person's achievements and changes
- Appointments attended/referrals made
- Any group activity involvement
- Any information given to the person
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Trainer prompts for page 8

Show the learners the documents on the last page of the booklet. Explain that these can be used as a reference by taking them off the booklet, if they want to.

The Objective writing poster is intended to help writers move away from the subjective interpretations in the left column, by recognising what they actually saw happen (middle column). They could also consider if the behaviour exhibited is actually the person's way of communicating one of the options on the right, or something else. [The Communication chart information on the following page is a way they can follow up with this later].

It's beyond the scope of this session to go into too much depth about this, however it is important to mention. Practice will inform the way progress notes are written. If we want objective notes, then we need to promote objective analysis of behaviour in practice.

This is why it is really important to make sure someone with the appropriate skills about the content of the notes is available in this training session. Defer to them, as needed during this discussion ... but be careful of your timeframe. They might need to run a separate session about this as a follow up