FREE CHECKLIST

# The DSP competency observation checklist

**Sources** (Read November 15, 2026. Area names and quoted lines are as published; the checklist wording, the 90-day rhythm and the matching between the two sets are ours.) [1] National Alliance for Direct Support Professionals (NADSP), *The NADSP Competency Areas*. https://nadsp.org/resources/competency-areas/ [2] Centers for Medicare & Medicaid Services (CMS), National Direct Service Workforce Resource Center, *CMS Direct Service Workforce Core Competencies: Final Competency Set*, December 2014. https://www.medicaid.gov/sites/default/files/2019-12/dsw-core-competencies-final-set-2014.pdf

One copy per shift observed. Tick each skill you see the DSP show; leave the others blank. Each numbered section is one NADSP area, with the closest CMS area named; section 16 is CMS's Safety area.

## Observation details

| DSP | Observed by | Date and shift |
|---|---|---|
| | | |
| **Setting** | **Observation (1, 2 or 3)** | **Person's plan followed (initials)** |
| | | |

## 1. Participant Empowerment

*NADSP area 1* (NADSP). Closest CMS area: Empowerment & Advocacy.

- ☐ Helps the person develop strategies, make informed choices, follow through on responsibilities and take risks.
- ☐ Involves the person in designing and carrying out their own supports.
- ☐ Encourages and helps the person speak on their own behalf, and shares information on self-advocacy and peer support groups.
- ☐ Shares information about rights and resources, and helps the person use it to make decisions about living, work and relationships.

Notes and examples (section 1)

## 2. Communication

*NADSP area 2* (NADSP). Closest CMS area: Communication.

- ☐ Builds rapport by recognizing and adapting to the person's communication style.
- ☐ Uses the modes of communication that fit the person's communication needs.
- ☐ Uses work terms correctly and explains them so the person understands.

Notes and examples (section 2)

## 3. Assessment

*NADSP area 3* (NADSP). Closest CMS area: Evaluation and Observation.

- ☐ Gathers information for an assessment, such as the person's own view and history and prior records, and tells the person what to expect.
- ☐ Conducts or arranges assessments of the person's needs, preferences and capabilities using appropriate tools, as the role allows, and reviews the process for inconsistencies.
- ☐ Talks through findings with the person clearly and follows up on them.

Notes and examples (section 3)

## 4. Community and Service Networking

*NADSP area 4* (NADSP). Closest CMS area: Community Inclusion and Networking.

- ☐ Helps identify the community supports the person needs, working with the person's informal supports.
- ☐ Keeps information on community resources current.
- ☐ Helps the person reach needed community resources, coordinating supports across agencies.
- ☐ Takes part in outreach to people who may use your services.

Notes and examples (section 4)

## 5. Facilitation of Services

*NADSP area 5* (NADSP). Closest CMS area: Person-Centered Practices; Professionalism and Ethics.

- ☐ Keeps collaborative, professional relationships with the person and the whole support team, including family and friends.
- ☐ Follows ethical standards such as confidentiality and informed consent, and recognizes their own limits.
- ☐ Helps develop and carry out the person's individualized plan, based on the person's preferences, needs and interests.
- ☐ Helps review the person's progress toward their outcomes.

Notes and examples (section 5)

## 6. Community Living Skills & Supports

*NADSP area 6* (NADSP). Closest CMS area: Community Living Skills and Supports.

- ☐ Supports the person's physical and personal needs by teaching skills, providing supports and building on the person's strengths.
- ☐ Supports household tasks, such as meals, laundry and cleaning, and transportation in ways that build the person's skills and independence.
- ☐ Helps find and use needed equipment and therapies.
- ☐ Supports the person's friendships and other relationships.
- ☐ Helps the person recruit and train service providers when needed.

Notes and examples (section 6)

## 7. Education, Training & Self-Development

*NADSP area 7* (NADSP). Closest CMS area: Education, Training and Self-Development.

- ☐ Completes required training and certification, and keeps up professional development.
- ☐ Shares knowledge with the person, coworkers and community members.

Notes and examples (section 7)

## 8. Advocacy

*NADSP area 8* (NADSP). Closest CMS area: Empowerment & Advocacy.

- ☐ Works with the person to identify advocacy issues, gathering and reviewing the facts.
- ☐ Knows current laws, services and community resources well enough to help the person secure supports.
- ☐ Assists or represents the person when barriers block a needed service, and speaks with decision-makers when appropriate.
- ☐ Educates community members and organizations, such as an employer or landlord, when it helps the person.

Notes and examples (section 8)

## 9. Vocational, Educational & Career Support

*NADSP area 9* (NADSP). Closest CMS area: Community Inclusion and Networking.

- ☐ Explores the person's work interests and aptitudes, and helps them prepare for a job or school.
- ☐ Helps the person identify job or training opportunities and present their capabilities.
- ☐ Works with employers and school staff to support the person, adapting the environment and supporting job retention.

Notes and examples (section 9)

## 10. Crisis Prevention and Intervention

*NADSP area 10* (NADSP). Closest CMS area: Crisis Prevention and Intervention.

- ☐ Identifies a crisis, defuses the situation, chooses an intervention strategy and contacts the supports needed, as the person's plan directs.
- ☐ Keeps monitoring the situation, discusses the incident with authorized staff and the person, works with the team to adjust supports and the environment as the person's plan allows, and reports as regulations require.

Notes and examples (section 10)

## 11. Organizational Participation

*NADSP area 11* (NADSP). Closest CMS area: Cultural Competency; Professionalism and Ethics.

- ☐ Knows the organization's mission and practices, and takes part in the life of the organization.
- ☐ Contributes to program evaluation and to setting quality priorities.
- ☐ Brings sensitivity to cultural, religious, racial, disability and gender issues into daily practice.
- ☐ Gives and accepts coworker support, takes part in supportive supervision and performance evaluation, and contributes to screening potential employees.
- ☐ Offers ideas on budget priorities and more cost-effective ways to provide services.

Notes and examples (section 11)

## 12. Documentation

*NADSP area 12* (NADSP). Closest CMS area: Person-Centered Practices; Professionalism and Ethics.

- ☐ Keeps accurate records and submits them on time.
- ☐ Keeps standards of confidentiality and ethical practice.
- ☐ Stays current with the agency's documentation systems and manages their own documentation.

Notes and examples (section 12)

## 13. Building and Maintaining Friendships and Relationships

*NADSP area 13* (NADSP). Closest CMS area: Community Inclusion and Networking.

- ☐ Helps the person plan community activities and events, such as reservations, money, materials and accessibility, and arrange transportation.
- ☐ Encourages and helps the person with friendships, peer interactions and getting to know neighbors.
- ☐ Encourages and helps the person stay in touch with family, through calls, visits or letters.
- ☐ Encourages and helps the person with dating, as needed and as the person wishes.
- ☐ Helps the person communicate with social workers and financial workers.
- ☐ Encourages the person's involvement in community outings, and documents community activities and events.
- ☐ Carries out the person's individual supports for community activities.

Notes and examples (section 13)

## 14. Provide Person Centered Supports

*NADSP area 14* (NADSP). Closest CMS area: Person-Centered Practices.

- ☐ Supports people using a person-centered approach.
- ☐ Works with the team to adjust support programs and interventions so they stay person-centered.
- ☐ Encourages coworkers and supervisors to use person-centered practices.
- ☐ Knows person-centered planning and helps people develop their own person-centered plans.

Notes and examples (section 14)

## 15. Supporting Health and Wellness

*NADSP area 15* (NADSP). Closest CMS area: Health and Wellness; Safety.

- ☐ Gives medications accurately and by agency policy and procedures, where the role includes it.
- ☐ Promotes healthy living and acts to prevent illness and accidents.
- ☐ Uses the right first aid and safety procedures in an emergency.
- ☐ Helps the person schedule, keep and follow through on health appointments.
- ☐ Helps with personal care, such as hygiene and grooming.
- ☐ Helps find and use adaptive equipment and therapies.
- ☐ Helps the person carry out health and medical treatments, as the person's plan and health care providers direct.
- ☐ Supports the person to take an active role in their own health care decisions.

Notes and examples (section 15)

## 16. Safety (from the CMS core set)

*CMS core set* (CMS, 2014). Closest CMS area: Safety.

- ☐ Identifies, prevents and reports abuse, exploitation and neglect according to laws and agency rules.
- ☐ Recognizes signs of abuse and neglect, including the inappropriate use of restraints, and works to prevent them.
- ☐ Keeps the person safe in an emergency.
- ☐ Helps the person be safe and learn to be safe in the community.
- ☐ Uses universal precautions and gives first aid as needed in an emergency.

Notes and examples (section 16)

## After the shift

- ☐ We talked it over, the DSP's view first.
- ☐ We chose one area to grow before the next observation.

Strengths seen

Area to grow, and the support we agreed

**One next step:** Level 1 ABA Online Training Course for groups. $99 per learner · One-time purchase · Each learner has 12 weeks of access from the day they activate their code · Free 7-day trial of the first 2 sessions.