DSP DAILY NOTE

Daily note

One note per person, per shift. Write what the person did, said and chose, the support you gave, and what the next shift needs to know. Your organization fills in its required items (section 10) and health items (section 6) before staff use this form.

1. About this note

Who the note is about, the date with the year, the shift's start and end times (AM or PM), the program or place, and your organization's name for the service.

Person's name or ID (as your policy says)	
Date (month, day and year)	
Shift start and end (AM or PM)	
Program or place	
Service (your organization's name for it)	

Where this comes from: Oregon ODDS, 2016; District of Columbia DDS, 2024; ICI Frontline Initiative, 2004. Oregon's toolkit asks for "your name, the name of the individual, date of service and date of progress note"; the District of Columbia's rule asks for "The start time and end time of each shift"; ICI: "Be sure to include AM or PM."

2. Plan goals worked on today

Each goal from the person's plan that today's support addressed, what was done toward it, what the person did, said or chose, and the progress you saw.

Goal from the person's plan (in their words, if the plan has them)	What we did toward it today	What the person did, said or chose	Progress you saw today

Where this comes from: 42 CFR 441.301(c); District of Columbia DDS, 2024; Oregon ODDS, 2016; Florida supported living guide. For Medicaid section 1915(c) waivers, the federal rule has the person's plan "Include individually identified goals and desired outcomes"; the District of Columbia asks for "The progress in meeting the specific goals in the ISP"; Oregon for "Any progress towards the person's ISP goals and outcomes."

3. Activities and community

Each activity today: where, for how long, who else took part (other than staff; describe them, such as "two other students," without naming other people served), what the person liked and what they did not.

Activity	Where	How long	Who else took part (not staff; no names of others served)	What the person liked	What the person did not like

Where this comes from: District of Columbia DDS, 2024; NADSP Competency Areas; Oregon ODDS, 2016; 42 CFR 441.301(c). The District of Columbia's Daily Notes Template has columns for the activity, its location, the length of time and who took part (other than the DSP), and asks "What did the person like about the activity?"; Oregon: notes "should not include the names of other people served"; NADSP: "The competent DSP documents community activities and events."

4. Choices the person made

What the person chose today (activities, food, clothes, who to spend time with), and anything they said no to, in their own words.

What the person chose	
Anything the person declined, in their words	
How you offered the choice	

Where this comes from: 42 CFR 441.301(c); NADSP Code of Ethics; Oregon ODDS, 2016. The federal settings rule for these waivers names "individual initiative, autonomy, and independence in making life choices"; Oregon's checklist asks you to note "if someone does not want support." The prompt for how you offered the choice is ours.

5. Support you gave

What you did: reminders, cues, showing, hands-on help, encouragement. Name the specific support, and what the person did on their own.

What you did (be specific)	
What the person did on their own	

Where this comes from: Oregon ODDS, 2016; Florida supported living guide. Oregon asks for "What actions you took and what specific support you provided"; Florida's guide lists phrases to use, such as "I helped…" and "I showed…"

6. Health and well-being

Anything new or not typical for this person today, what you saw or what they told you, and who you told. Your organization adds the health items its plans track.

Anything new or not typical (what you saw or what the person told you)	
Who you told, and when	
Appointments or health contacts today	

Your organization's health item (written in by your organization)	**Today**

Where this comes from: District of Columbia DDS, 2024; Oregon ODDS, 2016; CMS DSW Core Competencies, 2014. The District of Columbia asks for "The health or behavioral events or change in status that is not typical to the person"; Oregon for what you did "to help meet the person's health and safety needs." The prompts for who you told and for appointments are ours.

7. Incidents

If anything happened that your incident rule covers, write it on your incident report, and record the report number here.

Any incident this shift?	☐ No ☐ Yes: incident report number _____

Write the incident itself on your incident report form. A free one: DSP incident report template.

Where this comes from: Oregon ODDS, 2016. Oregon's checklist asks whether the note describes "Any incidents that occurred." The incident report itself is a separate form; the prompts here are ours.

8. What helped and what did not

What worked well today, and what did not go as planned. Is the plan working? Any new needs?

What worked well	
What did not go as planned	
Any new needs	

Where this comes from: District of Columbia DDS, 2024; Oregon ODDS, 2016. The District of Columbia's Daily Notes Template asks "What worked well?" and "What didn't work well or didn't go as planned?"; Oregon: "Is the plan working? Are there any new needs?"

9. For the next shift

What the next person on shift needs to know, and anything that needs follow-up: what, who and by when.

What the next shift needs to know	

Follow-up needed: what	Who	By when

Where this comes from: District of Columbia DDS, 2024; Florida supported living guide; ICI Frontline Initiative, 2004. The District of Columbia asks for "The matters requiring follow-up"; Florida's guide for "any follow-up needed"; ICI: support after you leave "may depend upon what you have written." The who and by-when columns are ours.

10. Your organization's required items

Blank on purpose. Your state, your waiver and your agency set what a note for each service must show. Your organization writes those items here before staff use the form.

Item your organization requires (written in by your organization)	Entry

Where this comes from: 42 CFR 431.107(b); District of Columbia DDS, 2024; Florida supported living guide. Under 42 CFR 431.107(b), each provider's agreement with the state Medicaid agency includes that it will "Keep any records necessary to disclose the extent of services the provider furnishes to beneficiaries"; the District of Columbia lists note contents "as set forth in each service rule"; Florida's guide: "Progress must be documented as required by the state."

11. Your signature

Your name, title, signature, and the date and time you wrote the note. Sign only what you wrote.

Your name and title	
Signature (or electronic signature, where your system and rules allow)	
Date and time written (AM or PM)	

Where this comes from: ICI Frontline Initiative, 2004; District of Columbia DDS, 2024. ICI: "Always sign what you have written." The District of Columbia asks for "the signature of the Direct Support Professional (DSP)".

12. Review

The house manager's or supervisor's name, date and comments, as your policy says.

Reviewed by (name and title)	
Date	
Comments	

Where this comes from: Oregon ODDS, 2016. In Oregon, Services Coordinators and Personal Agents "review progress notes to see how supports are working." Who reviews notes in your organization is your policy's call; the prompts here are ours.

How to write it

Each rule names its source; the example sentences and the worked example are ours.

Four questions every note answers

Goals	What did the person do toward the goals in their plan today? (42 CFR 441.301(c); District of Columbia DDS, 2024; Oregon ODDS, 2016)
Choices and enjoyment	What did they choose, take part in and enjoy, and what did they not like? (42 CFR 441.301(c); District of Columbia DDS, 2024)
Health and changes	Is anything new or not typical for them today, and who did you tell? (District of Columbia DDS, 2024; Oregon ODDS, 2016)
Next shift	What helped, and what does the next person on shift need to know or follow up? (District of Columbia DDS, 2024; ICI Frontline Initiative, 2004)

Ten rules

1. **Write it during or right after the shift.** ICI: documenting "immediately (or soon as possible) after it occurs is optimal," and "Never document something before it happens." Oregon's tip: writing soon after "helps you remember the details of the interaction." (ICI Frontline Initiative, 2004; Oregon ODDS, 2016)
2. **Start from the person's plan.** Name the goal you worked on and what the person did toward it. Florida's guide: "Documentation should reflect specifically what the person is trying to accomplish." (Florida supported living guide; Oregon ODDS, 2016)
3. **Write what the person did, said and chose.** Put their words in quotation marks, or describe the signs, gestures, pictures or device they used; that advice is ours. The NADSP Code asks DSPs to "Support each person's choices, preferences, abilities, and opinions." (NADSP Code of Ethics)
4. **Name the support you gave.** Oregon asks for "What actions you took and what specific support you provided." Florida's guide suggests "I helped…", "I assisted…", "I showed…" and lists phrases not to use, such as "…was lazy". (Oregon ODDS, 2016; Florida supported living guide)
5. **Facts first; label any opinion.** Objective documentation is "just the facts." If you add an opinion, ICI says "always indicate that this is your opinion." Oregon's checklist: "State the facts. Avoid personal opinions." Where your agency's policy allows no opinions, leave them out. (ICI Frontline Initiative, 2004; Oregon ODDS, 2016)
6. **Make every note about this person, today.** Oregon: "Progress notes should be unique to the person served. Notes should never be copied or "cookie cutter"." (Oregon ODDS, 2016)
7. **Write what is new or not typical.** A change matters more than a routine day. The District of Columbia asks for "The health or behavioral events or change in status that is not typical to the person"; Oregon asks about "Any new needs that may have come up." (District of Columbia DDS, 2024; Oregon ODDS, 2016)
8. **Pass on what helped.** Write what worked, so the next DSP can do it too. ICI: support given "after you leave for the day may depend upon what you have written." Amado's article describes what one DSP knows about a person's church, club and library, and says "Ideally, that information is documented for others". (ICI Frontline Initiative, 2004; ICI, Amado, 2004)
9. **Use respectful, plain words.** The NADSP Code: "Use respectful and inclusive language that reflects each person's preferences." Oregon: "Use respectful language. Avoid slang or abbreviations." ICI allows abbreviations only if "approved by your organization." (NADSP Code of Ethics; Oregon ODDS, 2016; ICI Frontline Initiative, 2004)
10. **Sign it, correct it the right way, keep it private.** ICI: "Always sign what you have written." For a mistake, "simply draw a line through the error and place your initials next to it." Oregon: notes "should not include the names of other people served." The NADSP Code: "Follow the confidentiality policies and guidelines of my employer and the state." (ICI Frontline Initiative, 2004; Oregon ODDS, 2016; NADSP Code of Ethics)

Facts, not opinions: six examples

Made up for teaching; the names are invented.

Topic	Instead of	Write
Goal progress	*Luis worked on his money goal.*	Goal: "I want to buy my own groceries." At the store at 4:20 PM, Luis found 6 of the 8 items on his picture list and asked a clerk where the rice was. He paid with a $20 bill and counted his change with the cashier.

Topic	Instead of	Write
Choices	*Keisha refused to go out and was uncooperative.*	At 1:00 PM, Keisha said, “Not today. I’m staying home.” She chose to stay in and painted at the kitchen table for about an hour. She said yes to asking again about the library on Thursday.
Health	*Tom seemed sick today.*	Tom ate about half of his lunch and said, “My tooth hurts,” at 12:30 PM. I told the house manager at 12:45 PM. She called his dentist, and he has an appointment on Friday at 9:00 AM.
Community	*Mei had a good day at the community center.*	From 2:00 to 3:15 PM, Mei went to the drop-in art class at the community center. She talked with two other students about their drawings and said, “I want to come back next week.” She did not like the loud hallway and put on her headphones there.
What helped	*Andre was difficult this morning but calmed down.*	At 7:10 AM, Andre said, “Too early.” I showed him his picture schedule, and he chose to shower after breakfast instead of before. He was dressed and at the van at 8:05 AM. The schedule and the choice of order helped.
Support given	*Rosa needs total assistance with everything.*	I set the shower water temperature, and Rosa washed her own face and arms. She chose the blue sweater and buttoned the top two buttons herself; I did the rest, as she asked.

A worked example: one evening shift

Made up for teaching: an evening shift at a group home. Luis and the staff are invented. Sections 10 and 12 are your organization’s and the reviewer’s, so they are not shown.

§	Field	Entry
1	**Person**	Luis R. (ID as your policy says)
1	**Date and shift**	Tuesday, March 2, 2027, 3:00 PM to 11:00 PM
1	**Program or place**	Maple Street home
2	**Goal from the plan**	“I want to buy my own groceries.”
2	**What we did, what Luis did, progress**	At the store at 4:20 PM, Luis found 6 of the 8 items on his picture list and asked a clerk where the rice was. He paid with a $20 bill and counted his change with the cashier. Last week he found 4 of 8 (Thursday’s note).
2	**Goal from the plan**	“I want to call my sister every week.”
2	**What we did, what Luis did, progress**	At 7:30 PM, Luis chose her name from his phone’s favorites and called her himself. They talked for about 20 minutes. He said, “She’s coming Sunday.”
3	**Activities and community**	Grocery store, 4:00 to 5:00 PM. He said hello to the cashier he knows. Luis liked “picking the bananas myself.” He did not like the long checkout line and asked to use the self-checkout next time.
4	**Choices**	Chose tacos for dinner from the three ideas I offered, and helped cook. Chose to watch the basketball game in the living room instead of his room. Said no to a shower tonight: “In the morning.” I wrote it in section 9 for the morning staff.
5	**Support given**	At the store, I held the list while he looked and pointed to the aisle signs twice. At dinner, I cut the onion; Luis browned the meat and set the table on his own.
6	**Health and well-being**	Nothing new or different today. He said his knee “feels better” after last week’s appointment. Walked the whole store without stopping.
7	**Incidents**	None this shift.
8	**What helped and what did not**	The picture list helped him find most items. Waiting in a long line did not go well; he walked away from the line once and came back when I said we could try the self-checkout next time.
9	**For the next shift**	Luis plans to shower in the morning; offer it after breakfast. His sister is visiting Sunday afternoon. Follow-up: ask the house manager about adding a self-checkout step to his grocery goal (me, by Thursday).
11	**Signature**	Written by J. Okafor, DSP, March 2, 2027, 10:40 PM.

Before you sign: a ten-point check

☐ The date has the year, and the shift times have AM or PM.

☐ Each plan goal worked on today has what the person did and the progress you saw.

☐ The person's own words are in quotation marks.
☐ Their choices, and anything they said no to, are written down.
☐ Your support is named: what you did, and what they did on their own.
☐ Anything new or not typical is written, with who you told.
☐ Any incident has its report number.
☐ The next shift knows what helped and what to follow up.
☐ No opinions without a label, no labels for the person, no other person's name.
☐ You signed it, and any mistake has one line through it and your initials.

Built on Oregon's Progress Note Checklist and ICI's rules; the wording is ours.

For training leads: set it up and teach it in five steps

1. **Fill in your required items first.** Open your state's rules for each service you provide, your waiver documents and your agency's policy. Write the items a note must show into section 10, and the health items your plans track into section 6, in the Word form or on a printed master copy. We leave both blank on purpose: they differ by state, by waiver and by service. Then save it as your agency's master copy.
2. **Add each person's plan goals.** In a copy of the form for each person (typed or printed), type the goals from their plan into section 2, in the person's own words where the plan has them, so a DSP never has to look them up mid-shift. Keep that as the person's master copy, and use a fresh copy for each shift.
3. **Teach the four questions and the ten rules with the example pairs.** Read each "instead of" line aloud and have staff rewrite it as facts before you show the "write" line.
4. **Practice with the worked example.** Describe Luis's evening in a few sentences, have each new DSP write the note, then compare it with the worked example and the ten rules.
5. **Read notes as a reviewer.** Each week, read a few notes per person and ask Florida's bottom-line question: "Given the information collected, am I able to determine if the person is improving, losing, or maintaining skills or routines, is staying healthy and free from abuse, neglect, and exploitation?"

Where each section comes from

Read November 15, 2026. The section prompts, the rules' wording, the examples and the worked example are Special Learning's; the quoted lines are as published. None of these organizations has reviewed or endorsed this template. The fillable Word version is at the web address at the foot of each page.

1. **42 CFR 441.301(c).** 42 CFR 441.301(c)(2) The person-centered service plan, and (c)(4) Home and community-based settings, for Medicaid section 1915(c) home and community-based services waivers, eCFR, up to date as of November 12, 2026. https://www.ecfr.gov/current/title-42/section-441.301
2. **42 CFR 431.107(b).** 42 CFR 431.107(b), Required provider agreement (Medicaid), eCFR, up to date as of November 12, 2026. https://www.ecfr.gov/current/title-42/section-431.107
3. **CMS DSW Core Competencies, 2014.** Centers for Medicare & Medicaid Services, National Direct Service Workforce Resource Center, 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
4. **NADSP Competency Areas.** National Alliance for Direct Support Professionals (NADSP), The NADSP Competency Areas, Area 12: Documentation and Area 13: Building and Maintaining Friendships and Relationships, as published on nadsp.org. https://nadsp.org/resources/competency-areas/
5. **NADSP Code of Ethics.** National Alliance for Direct Support Professionals (NADSP), The NADSP Code of Ethics (revised 2026), tenets as published on nadsp.org. https://nadsp.org/resources/the-nadsp-code-of-ethics/
6. **ICI Frontline Initiative, 2004.** Traci LaLiberte, "Doing Documentation 'Write!'," Frontline Initiative, Volume 5, Number 4 (2004), Institute on Community Integration, University of Minnesota. https://publications.ici.umn.edu/frontline-initiative/5-4/doing-documentation-write
7. **ICI, Amado, 2004.** Angela Novak Amado, "Is it Paperwork? Or, is it the person?," Frontline Initiative, Volume 5, Number 4 (2004), Institute on Community Integration, University of Minnesota. https://publications.ici.umn.edu/frontline-initiative/5-4/is-it-paperwork-or-is-it-the-person
8. **Oregon ODDS, 2016.** Oregon Department of Human Services, Office of Developmental Disabilities Services, Progress Notes Toolkit: A guide for Personal Support Workers serving people with disabilities in Oregon (December 2016). https://www.oregon.gov/odhs/providers-partners/idd/pswresources/psw-progress-notes-toolkit-en.pdf
9. **District of Columbia DDS, 2024.** District of Columbia Department on Disability Services (DDS), Medicaid Waiver Services Documentation Requirements (February 2024), and its Individualized Day Supports: Daily Notes Template. https://dds.dc.gov/sites/default/files/dc/sites/dds/page_content/attachments/Medicaid%20Waiver%20Services%20Documentation%20Requirements-%20FINAL%202.16.2024.pdf Daily Notes Template: https://dds.dc.gov/sites/default/files/dc/sites/dds/publication/attachments/Daily%20Notes%20Template_0.pdf
10. **Florida supported living guide.** A Guide to Supported Living in Florida, Chapter Six: Documenting Progress, produced for the Florida Developmental Disabilities Council by Program Design, Inc. (2003 to 2005), as posted by the Florida Agency for Persons with Disabilities. https://www.apd.myflorida.com/customers/supported-living/living-guide/docs/chapter6.pdf

---

One next step: if your staff support autistic people, the Level 1 ABA Online Training Course for groups introduces autism and behavior-support foundations. $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.