Progress note writing checklist

Free template from soapnotes.xyz. Fill it in by hand or type over it.

PROGRESS NOTE CHECKLIST: BEFORE YOU WRITE

Did you read the last note and the current plan?

Do you know the goals this visit relates to?

Do you have the same measures ready (scores, counts, observations)?

WHILE YOU WRITE

Is the date, time, length of visit and who attended recorded?

Does the first line say why this visit happened?

Does the note say what is different since last time (better, the same, worse)?

Is every claim backed by something specific (a score, a count, a quote, an observation)?

Does it say what you did, in plain words (assessment, treatment, skill taught, advice given)?

Does it say how the person responded?

Is anything copied forward still true today?

SAFETY AND RISK

Did you record any risk you asked about, and the answer?

For mental-health notes: asked about thoughts of self-harm, and the answer:

Did you record any step taken in response?

LINK TO THE PLAN

Does the note name the goal or objective this visit supported?

Does it say whether progress is on track?

If the plan needs changing, did you say so and say why?

NEXT

Is the next appointment or review date recorded?

Is anything the person agreed to do before then recorded?

Is anything you agreed to do (referral, call, form) recorded, with a date?

BEFORE YOU SIGN

Could a colleague covering for you carry on from this note?

Would you be comfortable with the person reading it?

Is it free of opinion presented as fact, and of detail that does not bear on care?

Did you add your name, credentials, date and time?

QUICK WORDING SWAPS

Instead of "doing well": [score or behavior] compared with [date].

Instead of "had a good session": [what was covered] and [how the client responded].

Instead of "no change": [measure] unchanged at [value] since [date].

Instead of "client was resistant": [what was said or done] and [your reading, marked as such].

Signature and credentials:

Educational template, not medical or legal advice. Follow your employer and regulator rules.