Annotated Guidance for Writing Early Intervention Session Notes

Early Intervention Session Notes are to be completed for each session as well as when planned service delivery does not occur. A copy of the session note must be given to the parent/guardian/caregiver at the end of the session. Notes should be written legibly so that they can serve as a resource to the family/caregiver or other team members and service providers.

Each session note will include the following:

Date the service was delivered
Name of the Child receiving the service
Date of Birth of the child
Provider/Agency that delivered the service
Type of Service:
- SI/SE – Special Instruction/Special Education
- OT – Occupational Therapy
- PT – Physical Therapy
- ST – Speech Therapy
- Other – Please specify (ex. Nursing, Social Work, Audiology, Vision, etc.)

Type of Session:
- Individual – Service provided to just one child
- Group – Service provided to a child in a group setting
- Other – Please specify

Location of Session:
Indicate the location where the service was provided, ex. Home; Early Childhood Classroom, Community setting, Ex. Park, library, store, etc.

Update since last session:
Update information about the child/family related to any changes in medical, educational, social, developmental or other services. Discuss how the activities, strategies and recommendations from previous sessions are actually working. If something isn't effective, discuss adaptations or different routines/strategies for that activity.

Routine-Based Activities/Strategies/Recommendations

Outcome(s)/Goal(s) to be addressed:
Clearly identify which Outcome(s)/Goal(s) is being worked on. Include the Outcome/Goal # number as well as enough text to unmistakably identify the Outcome/Goal.

Routine Used:
Session notes need to contain documentation that services are being delivered within the context of the family's/preschool's routines and in a manner that is functional for the child. Put a check in the box next to each of the routines that may apply.

Play with Objects	Computer/TV/Video
Physical Play	Reading with Books
Pretend Play	Songs and Rhymes
Play with Others	Writing/Drawing
Bath/Hygiene Related	Community/Family errands
Medical/Comfort	Family Activities
Dressing Related	Recreation/Socialization
Eating Related	Other: (please specify)

Description of Activity and Recommendations:
Include how the family member/caregiver was involved in the visit. The note needs to give a clear, unique and detailed description of the visit. Include what was discussed with the

family/caregiver regarding suggested activities/strategies and how to use the particular activity during daily routines. Include specially designed instruction, supplementary aids and program personnel supports, home or program modifications and training and materials used/needed by the family or therapist.

Provide recommendations of activities the parent/caregiver can do between visits to enhance the child's progress and learning. Include information to enhance the family's/caregiver's capacity to assist their child's development and enhance the child's participation in everyday activities. Each recommendation should include a description of the appropriate natural environments or least restrictive environment, including community settings, and family activities and routines.

Strategies Used:

Early Intervention services need to be provided in a manner that will positively impact the family/caregiver's ability to successfully support the child's participation in daily activities. The Early Interventionist should choose a strategy that best matches the learning style of the family/adult caregiver as well as the child. Put a check in the box next to each of the strategies that were used.

Establish Predictable Routines
Increase Opportunities for Child to Practice
Turn Taking
Talk About or Label What You Are Doing
Use Physical Gestures as Cues
Wait or Pause for Response
Model or Demonstrate for Child
Encourage Child to Imitate
Provide Directions for What To Do
Use Visual Supports or Other Assistive Technology (AT)
Other: (please specify)

Progress Notes

Progress:

Codes for Progress: ***I****-Improvement* ***M****-Maintaining Skills* ***SI****-Slight Improvement* ***SL****-Slight loss of Skills*

Information needs to directly reflect the measurement strategy identified under **"**How will we as a team measure progress and collect data for this outcome/goal?" Include what was measured and how it was measured. The note may also contain documentation of progress with the use of suggested activities or strategies during the daily routines. Include information regarding the child's rate of attainment or the child's current skill level, as it relates to the outcome/goal. A review and analysis of this section over time will provide the basis for documentation of progress to support the requirement of ongoing progress monitoring of the outcomes/goals. Data should be presented in a manner that is understandable to parents/caregivers and describe progress in specific, functional terms.

Plans for next session:

This section is to be used to capture the Early Interventionist and the family/caregiver's plans for the next session. This may include activities/routines as well as revisions or modifications to strategies as needed or plans for addressing any lack of progress.

Data collection between sessions:

Where the team determines it necessary, indicate the data/information that will be collected between sessions. This may be data collected for progress monitoring as identified on the Outcome/Goal, as well as, any additional informal data that may be collected by the family or caregiver to help instruct or support service delivery.

Name/Signatures:

Each note should include the name and signature of the Early Intervention Professional who provided the service and the signature of a supervisor if needed. The note must also include a Parent/Caregiver signature.

Times/Units:

The note needs to include the begin time of the session as well as the end time, ex. 9:10 am to 10:13 am. The number of units is calculated by taking the number of minutes and dividing by 15, then rounding down to the nearest whole number, ex. 63÷15=4.2 which would equate to 4 units of service.

Next Session:

The date/time of the next scheduled visit/session.

Missed Session:

When a planned service delivery does not occur (i.e. child or Early Intervention Professional is absent; cancellation without notice or an act of nature) the Early Intervention Professional should document this occurrence, including the reason, in the child's record but should not utilize the NCR version of the session note format.

Additional Guidance

- **Write Objectively**
  Remember that the session note is not about you or your feelings. Make sure that your session notes do not reflect any negative feelings or reactions that you have toward the child, other people or events. Try to avoid terms and descriptions that seem judgmental.
- **Write Clearly**
  Be objectively descriptive. It helps you be precise about what you are describing. Try to avoid vague or general terms. Use proper grammar, and be sure that each sentence has proper sentence structure and sequencing of words so others can understand what you are documenting.
- **Write What You Observe**
  Documenting the following can be useful information: the child's appearance, mannerisms, dress, response to situations or events or to the interaction with you or others, intensity of mood, etc.
- **Write So Others Can Understand**
  Your primary purpose is to explain things so others can understand what you are documenting.
- **Write Using People First Language**
  When describing a child and referencing their disability, identify the child first, then the disability. The disability represents only one of many characteristics of the person.

Some of the suggestions included above are adapted from the following text:
Summers, Nancy (2001). *Fundamentals of Case Management Practice*. Brooks/Cole Thomson Learning, United States