

# DOCUMENTATION



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### Required Documentation

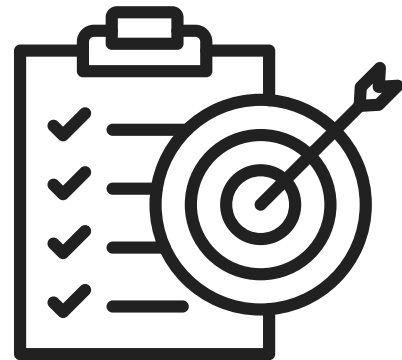
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## Self-Directed Support Toolkit

### Section 3

# DAILY DOCUMENTATION



Daily Documentation is the practice of recording or tracking daily activities, tasks, events or other information at the end of a shift that a Direct Support Professional completes with a consumer.

Why is Daily Documentation important?

- Establishes a baseline of an individual's strengths and needs
- Accuracy and Accountability
- Continuity of Care/Service
- Transparency and Trust
- Tracks evidence of trends and patterns (both positive and challenging)
- Measures progress towards goals

While this documentation is required to be taken, the format and manner in which it is taken and stored is completely flexible and up to you.

Employers (Individuals and/or caregivers) are responsible for keeping this documentation and ensuring that their staff is filling it out every shift.

Please keep in mind that this documentation should be kept for a minimum of 7 years in case of an audit.

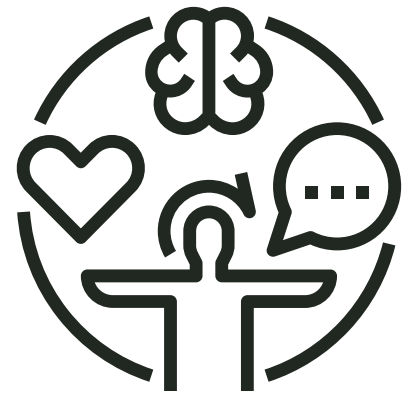
**TIP:** It is encouraged that the individual being supported should be involved in this process. Such as taking time to reflect on or recount the day with staff.

### Some Ideas for daily documentation:

- Keep a paper notebook with a brief summary or keywords that describe what was done during the day
- Keep an online Word or Google document similar to the above (reduces the need to store paper)
- Fill out [Shift Notes Sheet](#)
- [Create and use a Google Form](#)
- Upload or print pictures from the day that show the activities and goals done together that day. Keep them in a document and/or folder.



# SUPPORTING & DOCUMENTING NEEDS AND CHANGES



It can be helpful to note any observations that indicate changes in a person, both positive and challenging.

## WHY?

- To **show evidence** of why current **support levels** are necessary
- To explain **why** someone may need **more support**
- It can be helpful at **plan meetings and assessments**
- It can help to **observe growth and success!**

## HOW?

Keep a **notebook** or **online document**.

### Record:

- The Date
- Time
- What **happened**
- What was happening **leading up to the event?**
- **Why** was it **unusual?**
- **How many times** it happens or continues to happen

## Examples of what to make note of:

Safety Concerns  
Communication Needs

Changes in Memory  
or Mobility

Decline in Hygiene  
or Self-care



# SHIFT NOTES

Employee Name:

Date	Notes

# Using Google Forms As Documentation



**Example Google Form**

1. Email
2. DPS Worker's Name:
3. Date:
4. Start Time:
5. Where are you working:  
☐ Community  
☐ Option 2  
☐ Workplace/Volunteer
6. Practice money skills at retail stores: cash, credit, & gift cards. Mark only one circle:  
☐ Yes  
☐ No
7. Independently take care of personal needs (reduction of prompts). Mark only one circle.  
☐ Yes  
☐ No
8. Continue to try new activities in the community. Mark only one circle.  
☐ Yes  
☐ No
9. Add any additional notes:

**Submit**  
Never submit passwords

Making a short documentation form for your staff to fill out every day can be a fast and convenient way to get and store your data.

You and your staff will need a Gmail account to use this method.

It's nice because staff can do it on their cell phones before leaving for the day.

The answers will automatically populate a spreadsheet for you with the answers once they've been submitted.



[Click Here or Use the QR for a Google Forms Tutorial on Youtube](#)

	A	B	C	D	E	F	G	H	I	J
	Form_Responses1									
1	Time:	1. Email	2. DPS Worker's Name:	3. Date:	4. Start Time	5. Where are you working:	6. Practice money skills at retail stores: cash, credit, & gift cards. Mark	7. Independently take care of personal needs (reduction of prompts). Mark	8. Continue to try new activities in the community. Mark only one	9. Add any additional notes:
2	4/3/2025	Blank@notreal email.com	Laura	3/26/25	9:00 AM	Community	No	No	Yes	She did a great job "going with the flow" today when we realized that the museum was closed today. We went to the zoo instead.

**Example of a Response by Staff**

# Reflections



How did today go?  
How did today make you feel?  
What was the best part of today?  
What wasn't?  
What did we achieve today?  
What goals did we work on?  
Did something challenge us today?  
How can we do better?

As documentation



## These are all good questions!

Having a practice of self-reflection and reflecting with others can be a nice way to think about your days. It could also be part of daily documentation.

It can look and be whatever you'd like it to be.

It could be a talk with family when you get home from work.

Your staff could help you write some notes or ask you questions when they do their daily documentation.

You could draw or find a picture to describe the day.

You could circle an emoji.

You could rate the day a number 1-5.

You could give a sign: "thumbs up"!

You could set a goal in the morning and see how you did at night.

[Check out the next page for a blank reflection worksheet.](#)



# MY DAILY REFLECTIONS

What went well? What didn't?  
How can you learn from today?

Completed With  
(Staff name):

Date:

What is your focus for today? How do you want to feel?



List three things that went well today.



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What challenged you today?

How did you feel today?



What is one thing you learned today?

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Write any other notes or thoughts about today here:

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Circle how you felt about today overall.



# REQUIRED DOCUMENTATION



There is some essential documentation that is required to be completed regularly and consistently in order to maintain your benefits and services.

It is critical to document to ensure that consumers who receive state and federally funded services follow the necessary rules and regulations that may be required for audits, inspections, and certifications.

This documentation includes but is not limited to:

- **Employment** and **Earnings** Reporting
- Requesting **Benefits Counseling**
- **Monthly SSI Earnings** Reporting

These reports and their associated services are outlined in the following pages.





# Self-Directed Support Toolkit

## Section 3

# EMPLOYMENT AND EARNINGS REPORTING



**STATE OF RHODE ISLAND**  
Department of Behavioral Healthcare, Developmental Disabilities and Hospitals  
**DEVELOPMENTAL DISABILITIES SERVICES**  
14 Harrington Rd  
Cranston, RI 02920  
TEL: (401) 462-3421  
FAX: (401) 462-2558

**EMPLOYMENT AND EARNINGS REPORTING FORM**

This form is used for the required reporting of earnings, income, and employment changes to BHDDH and Medicaid (Dept of Human Services). You only need to submit it to BHDDH. BHDDH will send it to DHS. The information in this form is used to calculate any income disregards. An Income Disregard is a portion of the income you earn from your job when determining your benefits. Without the income disregard, you may be required to pay a portion of your cost of care. This form will also be used to make referrals for Benefits Planning. Please complete all sections of the form. If you have any questions, please contact your BHDDH social caseworker.

Use this form to report 1) a new job, 2) any change in position, hours, or wages; or 3) when you leave a job. Please email this form to [BHDDH.ICE@bhddh.org](mailto:BHDDH.ICE@bhddh.org). If you are working for an agency, please use [Therap S-Comm](#). Encryption Required if emailed. See instructions on last page.

Please note: This form is used for BHDDH and Medicaid only. If you receive SSI/SSDI, you must report earnings to Social Security directly. If you have other benefits such as housing, report your income as those programs require.

Name \_\_\_\_\_ Submission date \_\_\_\_\_  
Address \_\_\_\_\_ Effective date \_\_\_\_\_  
Date of birth \_\_\_\_\_ SSN \_\_\_\_\_ Reason for submission (check one)  
Medicaid ID \_\_\_\_\_ Start job Hour/Wage Change Ended job  
Agency \_\_\_\_\_ If Job Ended, Reason for Leaving Job \_\_\_\_\_  
I self direct and this agency is my FI \_\_\_\_\_

1) Employer name \_\_\_\_\_  
2) Employer address \_\_\_\_\_  
Town \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

3) Type of paid work (select one)  
Competitive Paid Job Self-Employed Government-Sponsored Employment/Enclave  
Other \_\_\_\_\_

4) Is this a job under the Source America (Ability One) federal program? Yes No

5) Job category (select one from drop down menu) \_\_\_\_\_  
The job category relates to the job, not the employer industry. For example, a job in a cafeteria in a school would have a job category of "food service", not "education".

6 Title of Position \_\_\_\_\_

7) Weekly hours worked \_\_\_\_\_ Hourly wage \_\_\_\_\_ (Provide 1 month backup)

7) Do you want to work more hours per week? Yes No

8 If yes, how many hours per week do you want to be working? \_\_\_\_\_

9) Type of BHDDH-funded employment supports provided to the individual for this job (Check all that apply)  
Job Retention Job Coaching Job Transportation Adaptive Employment Device  
Average hours per week of all BHDDH employment supports related to this job \_\_\_\_\_

BHDDH Form Employment and Earnings Reporting Form 2022 1

The Division of Developmental Disabilities (DDD) has developed a streamlined process of employment/income reporting, Benefits Counseling referrals, and Income Disregard submission through the completion of one form called the Employment and Earnings Reporting Form.

You can find the online version of the form [here](#) or by using the QR code above.



PERSONAL SUPPORT BUILT ON PERSONAL EXPERIENCE

# BENEFITS COUNSELING



It is important for people to learn how working will impact their health insurance and cash assistance benefits. This will help people make informed decisions.

Benefits Counseling is a free service that can help people learn about how work will impact their benefits.

## BENEFIT COUNSELORS WILL HELP YOU...

Learn more about work incentives.

Pick out the work incentives that are best for you.

Find out how SSDI or SSI benefits will change if you start working.

Complete paperwork to sign up for work incentives.

Figure out how to manage SSDI or SSI benefits while working.

People can connect with a Benefits Counselor in a few ways.  
Some places to start searching for a Benefits Counselor include:

1. BHDDH Office: ask your social caseworker or email Jay MacKay at [Gerard.MacKay@bhddh.ri.gov](mailto:Gerard.MacKay@bhddh.ri.gov)
2. The Sherlock Center: Call 401-456-4733 or visit the [Sherlock Center Work Incentives Benefits Counseling website](#)
3. Social Security Administration (SSA): Call the toll-free number 1-800-772-1213 or visit the [SSA Website](#)
4. Social Security Ticket to Work Help Line: call 1-866-968-7842 (V) or 1-866-833-2967 (TTY) or visit the [Social Security Ticket to Work Website](#)

# Do you receive SSI payments?

## Report Earnings monthly

1. Report by phone, or
2. Report by mail, or
3. Report online.

Note: sign up for reminder emails or texts.



You can submit your wages online, by phone, or mail.

You can submit your wages using the SSA Mobile Wage Reporting App, available in the Apple App Store or Google Play.

You can sign up to receive an email or text message every month reminding you to report your wages.

[Sign up to get reporting reminders here](#)

Automated telephone wage reporting is also available 24 hours a day, 7 days a week.

Call 1-866-772-0953