

Audit-Proof Case Note Checklist

Protect Your Billable Hours | Strengthen Your NDIS Compliance

Use this checklist every time you or your staff write a case note. It ensures your notes link directly to participant goals and meet the standards of an NDIS audit.

Before You Write

- ☐ **Read the Participant's NDIS Goals**
Identify 1–2 goals the session supports (e.g., “Improve independence,” “Increase community participation”).
- ☐ **Understand the Support Purpose**
Ask: “What outcome are we helping the participant move toward today?”

Writing the Case Note

- ☐ **Use Specific Activity Descriptions**
Avoid: “Supported John in the community.”
Use: “Assisted John to navigate the local bus route from home to the library.”
- ☐ **Link the Activity to a Participant Goal**
Mention the goal directly (or paraphrase clearly).
“This supports John’s goal to increase confidence using public transport.”
- ☐ **Capture Measurable Progress or Observations**
What was achieved or observed during the support?
“John identified his bus number, boarded without prompting, and showed increased independence.”
- ☐ **Include Duration and Location**
Clearly record time and where the activity took place.

Bonus Checks (Compliance Gold)

- ☐ **Use Professional, Objective Language**
Stick to facts, not assumptions or opinions.
- ☐ **Avoid Copy-Paste Across Notes**
Duplicate notes across shifts raise audit red flags.

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Include Barriers or Challenges, if any

E.g., “John hesitated when checking bus timetables—this will be a focus next session.”

Final Review

Before saving or submitting the note, ask:

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“Does this note clearly show what we did?”

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“Does it explain *why* we did it, in relation to the participant’s goals?”

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“If audited tomorrow, would this note justify the support as claimable?”

Pro Tip:

Train your team to use a “Goal-First” mindset when writing notes. Make it second nature to begin every shift thinking, “Which goal am I supporting today?”

Need Help Auditing Your Notes?

Let [Angels Compliance and Training Services](#) review a sample of your records. Our experts can spot risks, improve your documentation standards, and help you stay audit-ready.



Book your confidential case-note review today.