

SHIFT NOTES POLICY

Effective Date: 07/07/2026 | Policy Owner: Kelly Van Der Westhuizen (Administration)

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1. Purpose

This policy sets the requirement for support workers to complete shift notes for every shift, on the day the shift occurs, and describes the standard of accuracy and completeness expected. It applies to all casual support workers engaged by CitiReach across all SCHADS Award classifications.

2. Policy Statement

Shift notes must be completed on the same day as the shift, as close as possible to the end of the shift. Where the participant is comfortable with it, it is **preferable for the shift note to be completed during the shift** (e.g. between activities, or while the participant rests) rather than left until the end — this improves accuracy and reduces the chance of details being missed. This must never come at the expense of the participant's engagement, safety, or dignity, and the note must still be finished on the same day regardless of when it was started.

Notes must not be batched up, backdated, or completed from memory days later. Every shift requires a note, even where nothing significant occurred — in that case, the note should say so explicitly.

3. Standard of Accuracy and Completeness

Shift notes must be:

- **Objective and factual** — recording what was observed and what was done, not opinions or assumptions.
- **Descriptive** — giving enough detail that someone who wasn't there can understand exactly what happened, including the participant's level of independence during each activity (what they did unprompted, what required verbal prompting, and what required hands-on assistance).
- **Accurate and complete** — covering all relevant details of the shift, including time, location, support provided, and the participant's response.
- **Timely** — written the same day, while details are still fresh and reliable.
- **Clear and professional** — plain language, no jargon, slang, or shorthand that others can't follow.
- **Person-centred** — reflecting the participant's own choices, voice, and dignity.
- **Confidential** — limited to information relevant to the participant's support, stored securely.

4. What Every Shift Note Should Include

- **Participant name, date, and shift start/end time.**
- **Location and type of support provided.**
- **What was done and the level of assistance given.**
- **The participant's level of independence, engagement, response, or any relevant observations.**
- **Any incidents, concerns, or changes — or an explicit note that there were none. Where an incident is recorded, classify it using the Priority levels in Section 5.**
- **Anything the next shift or the coordinator needs to know.**

5. Priority / Incident Classification

Where a shift note records an incident or concern, it must be classified using the priority levels below. This helps the coordinator triage what needs attention first and ensures urgent matters are escalated immediately rather than waiting to be read in the ordinary course of review.

Priority	What it covers	Action required
P1 — Critical	Immediate risk to life, health, or safety — e.g. medical emergency, serious injury, missing participant, allegation of abuse or neglect.	Call 000 if required. Notify CitiReach Administration by phone immediately, not just in the shift note. Follow CitiReach's incident management process.
P2 — High	Significant event with no immediate life-threatening risk — e.g. a fall without injury, an episode of aggression, a medication error, property damage.	Notify CitiReach Administration the same day. Document fully in the shift note and complete an incident report.
P3 — Medium	Notable event that needs awareness but not urgent escalation — e.g. a change in mood or routine, a missed activity, a minor complaint.	Record fully in the shift note. Flag to CitiReach Administration within 48 hours if it may need follow-up.
P4 — Routine	General shift observations with no incident.	Standard shift note only — no escalation required.

Some P1 and P2 events may involve conduct that a participant, their family, or CitiReach could report to the NDIS Commission. CitiReach is not a registered NDIS provider, so the formal Reportable Incidents notification scheme does not apply to CitiReach in the way it applies to registered providers. The NDIS Commission can still receive complaints about,

and take action in relation to, any NDIS provider or worker under the NDIS Code of Conduct. Support workers must still notify CitiReach Administration immediately for any P1 or P2 event so it can be managed appropriately.

6. Example

Avoid: *“Took Sarah out, she was fine, no issues.”*

Use instead: *“Supported Sarah with grocery shopping at Coles Main Street, 10:00am–11:30am. Sarah selected items independently and managed payment at self-checkout with standby assistance. No incidents to report.”*

Formatted example (ShiftCare-style layout)

CitiReach’s shift notes should capture the same structured fields used in the ShiftCare app — a header block of key details, followed by a descriptive note body and an incident flag. Whether completed on paper or in CitiReach’s system, notes should follow this structure:

Participant	Sarah M.
Support Worker	J. Smith
Date	14/07/2026
Shift Time	9:30am — 12:00pm
Service Type	Community Access

Note

Supported Sarah with grocery shopping at Coles Main Street, 10:00am–11:30am. Sarah selected all items independently using her shopping list and managed payment at self-checkout with standby assistance only. Sarah initiated conversation with the checkout operator without prompting. Prior to shopping, supported Sarah with meal planning for the week (9:30am–10:00am) — Sarah made all meal choices independently. Returned to Sarah’s home by 12:00pm; no support required with unpacking.

Incident recorded?	Priority	Handover notes
No	P4 — Routine	Sarah mentioned she'd like to try a new recipe next week — has asked for ideas.

7. Why This Standard Matters

- Shift notes are the primary evidence CitiReach and the participant’s other supports rely on for continuity of care.
- The NDIS Code of Conduct requires supports to be provided safely, competently, and with integrity, and shift notes are part of the evidence of this. The NDIS Quality and Safeguards Commission can request records such as shift notes as part of a complaint or incident investigation, regardless of a provider's registration status.
- Notes written on the day — ideally during the shift — are more accurate than notes reconstructed later, and same-day completion is consistent with standard practice across the disability support sector.

- Complete, accurate notes protect both the participant and the support worker if a concern is ever raised about a shift.

8. Process

- Where the participant is agreeable, support workers should complete the shift note progressively during the shift rather than waiting until the end.
- Support workers should also allow time at the end of each shift specifically to finish the note before finishing up.
- Notes are submitted through CitiReach's standard shift note process for that participant.
- P1 and P2 incidents must be phoned through to CitiReach Administration immediately, in addition to being documented in the shift note.
- Repeated late, incomplete, or vague notes may be discussed with the individual support worker to identify and resolve the cause.

9. Exclusions

This policy applies to CitiReach's casual support worker workforce paid under SCHADS Award classifications. It does not apply to individuals whose arrangements are managed separately and are not reflected in standard payroll or billing reports.

10. Questions

Questions about this policy, or about a specific shift note, can be directed to:

Admin Contact	Website
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Approved by: ___Steve Mifsud___ Head of operations/ CitiReach_____ Date: ___17/08/2026_____