Templates for Documentation

To reduce variability, organizations should provide fillable templates for peers and supervisors. Standardized templates also promote consistency across programs and sites, ensuring documentation is equitable, uniform, and audit-ready regardless of location or staff member.

Peer Progress Note Template

- Date/Time of Contact
- Type of Contact (individual session, group, outreach, phone, text)
- Client's Stated Goals or Concerns
- Support Provided (e.g., coaching, engagement, linkage to resources)
- Next Steps / Follow-up Plan
- Signature/Initials

Peer Activity Log Template

- Date
- Client or Group ID (no full names for privacy)
- Activity Type (outreach, group facilitation, recovery coaching)
- Duration
- Notes (brief, objective)

Supervision Summary Template

- Date/Duration of Supervision
- Peers Present (for group) or Peer Name (for individual)
- Topics Covered (boundaries, documentation, engagement, challenges)
- Action Items / Next Steps
- Supervisor Signature

Peer Progress Note Template

AdvaNCe Health TOGETHER
STRENGTHENING HEALTH THROUGH COLLABORATION

Date/Time of Contact: _____

Type of Contact: Individual   Group   Outreach   Phone/Text

Client's States Goals/Concerns: _____

Support Provided (objective, no clinical judgment):

Next Steps/Follow-Up

Plan: _____

Peer Initials/Signature: _____

Date/Time of Contact: _____

Type of Contact: Individual   Group   Outreach   Phone/Text

Client's States Goals/Concerns: _____

Support Provided (objective, no clinical judgment):

Next Steps/Follow-Up

Plan: _____

Peer Initials/Signature: _____

Peer Activity Log Template

Date	Client/Group ID	Activity Type (outreach, group, recovery coaching)	Duration	Notes (objective, brief)

Supervision Summary Template

Date/Duration of Supervision: _____

Type of Contact: Individual   Group

Peer(s) Present: _____

Topics Covered (boundaries, documentation, challenges):

Action Items / Next Steps:

Supervisor Signature: _____

Date/Duration of Supervision: _____

Type of Contact: Individual   Group

Peer(s) Present: _____

Topics Covered (boundaries, documentation, challenges):

Action Items / Next Steps:

Supervisor Signature: _____