

# Documenting Progress



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# Why Write a Progress Note?



Document progress for instructor, parent,  
funders

Aids in skill progression planning

Allows instructor to review and reflect

Research

Legal record

Record for substitute instructor

Narrative

Education



# SOAP Note



## Subjective

what the participant or parent tells you about how they feel or what's been going on



## Objective

measurable, observable, factual data



## Assessment

interpretation of collected information, identification of cause/effect, professional judgment



## Plan

future actions, goal setting

# **Session Goals (completed at beginning of EACH session)**

**Riding Skills:** 1.transfer skills to new horse  
2.steer by picking up rein after verbal prompt, visual offer 100% with correct hand  
3.hands on withers for 15 strides of walkup both directions

**ADLs:**fasten helmet buckle

**Cognitive Skills:** follow 1 step directions first ask

**Social Skills:**thank horse with pat after lesson

**Responsibility:**safe on ground and mounted



# Lesson Plan Kayson/Mick/HL/1SW

Objective: hands on withers over 4 ground poles x  $\frac{2}{5}$  opportunities

Mount at mounting block

Warmup - high five stretches

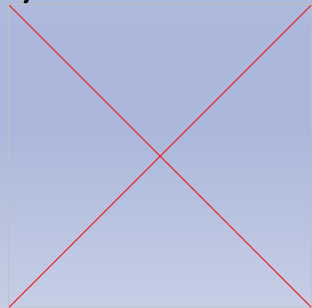
Halt in box x 2, halt in box and 2 point for 5 sec x 3 (by reaching high 5)

Weave 5 poles on diagonal x 5 each direction, picking up rein in direction of turn

2 point over 4 ground poles x 5 (hands on withers to approximate)

Walkup with hands on withers as time allows

Cool down



# Progress Note

Week \_\_\_\_\_ Date \_\_\_\_\_

Lesson Objective:

Subjective:

Objective(quantified observations):R-

ADLs:

Mob:

Social:

Cognitive:

Responsibility:

Assessment(how progress displayed):

Plan(for next week):







## Volunteer Input Benefits

- Engages volunteers
- Enhances volunteer training
- Provides a hand on perspective
- Increases the instructor's influence



Kayson - lesson objective: 2pt with hands on withers  
over 4 ground poles

~10 # vocalizations (horse) to start horse

~10 # halts picking up rein with hand over hand  
for both hands

1 # sec 2pt @ halt

4 # poles with hands on withers (2pt)  
max @ walk

6 # times hands on withers over g.p.

100 % steering by picking up rein  
with 90% accuracy for correct hand

**Progress Notes, Week # \_\_7\_\_, Date: 2/21/26**

**Mick/HL/2SW**

**Lesson Objective: 2 point with hands on withers over 4 ground poles x 2/3 opportunities**

**Subjective Observation: arrived with mom**

**Objective (Quantified progress): R-mounted at steps with no assist; 10 vocalizations to start horse; 10 halts with reins lifted after hand/hand prompt to use 2 hands; 1 sec max 2 point at halt x 3 while reaching to high 5 volunteer ; hands on withers to simulate 2 point held over 4 ground poles x 3 out of 6 opportunities; steering - picked up rein in response to verbal/visual prompt for 25/25 opportunities with correct hand for 90% of turns; walkup for 15 strides with hand on withers x 3 each direction**

**ADLs:**



**Mobility:led Mick one lap**

**Cognitive:**

**Social**

**Responsibility:needed a few reminders to use gentle hands**

**Assessment (How progress displayed)Kayson did well responding to verbal prompts from SW. More willing to verbalize- he is usually saying “horse” to start Mick. Much more willing to place hands on withers for 2 point- this puts him in a correct position to lift seat even though he is not lifting very much yet.**

**Plan (for next lesson):practice his 2 point and have him make some steering choices**



Questions?



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