

Workers' Comp Progress Report Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · August 2026

A **workers' compensation progress report** is the periodic report from the treating clinician to the claims administrator, insurer, or state board during an active work-injury claim: accepted condition, measured response, work restrictions, return-to-work outlook. Most run 300 to 700 words.

1 - Claim identifiers, reason, period what routes the report

Do: worker, claim number, date of injury, your role, the exact period covered; state why the report exists.

Pitfall: treating the 45-day cycle as the whole rule; California requires listed changes reported within 20 days.

2 - Subjective: interval change what changed since the last report

Do: symptoms now versus last report; sleep, mood, avoidance; home and work function.

Pitfall: retelling the injury story each cycle; the adjuster needs the interval, not the intake.

3 - Objective findings and measures evidence a reviewer can compare

Do: mental status, attendance, dated score trends (PHQ-9, GAD-7, PCL-5), functional tolerances.

Pitfall: severity carried by adjectives; give a dated trend plus one concrete functional gain.

4 - Diagnosis and accepted condition stay on the claim

Do: current code where the scheme asks; tie every intervention to the accepted condition.

Pitfall: quietly treating conditions the claim has not accepted; the mismatch surfaces in utilization review.

5 - Treatment delivered and response measured, never autopilot

Do: sessions, methods, adherence, measured response; when progress is flat, change the plan and say so.

Pitfall: the plan copied forward cycle after cycle; cloned reports read as no review.

6 - Work status and restrictions the section people act on

Do: status, specific restrictions with durations, projected return-to-work date where possible.

Pitfall: "remains off work" with nothing an employer could schedule modified duty against.

7 - Plan, prognosis, requests, signature close and route

Do: next interventions, frequency, expected duration; route requests per scheme (CA: RFA); sign with credentials.

Pitfall: burying the authorization ask in the narrative; a request review cannot see was never made.

Before you sign

- ☐ Reason for report and period covered stated
- ☐ Tied to the accepted condition, current code included
- ☐ Dated measure trend or functional comparison present
- ☐ Restrictions specific, with durations and projected RTW date
- ☐ Authorization routed per scheme (CA: RFA), not buried
- ☐ Signed with credentials; declaration where required

Drafting with AI

Give it the period's session notes, scores, and work-status details: interval change, response, restrictions, projected return date.

"Draft a 45-day workers' comp progress report from these six session notes: PCL-5 44 to 31, modified duty 4-hour shifts, ..."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

300-700 words
typical length

20-30 min by hand
clinical team estimate

CA: every 45 days
cadence varies by scheme

Insurer · board · employer
who reads it

Workers' Comp Progress Report Template

Copy or print for your practice - Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Worker (initials): _____ DOB: _____ Claim #: _____

Date of injury: _____ Report date: _____ Period covered: _____

Employer: _____ Insurer / claims administrator: _____

Reason: ☐ periodic ☐ change in condition ☐ change in work status ☐ insurer request

Accepted condition / diagnosis

Tie the report to the condition the claim accepted; current code where required

Subjective: worker's report and change this period

Symptoms now versus last report; home and work function

Objective findings and measures

Observed status, dated measure trend (PHQ-9, GAD-7, PCL-5), attendance, function

Treatment delivered and response

Sessions this period, methods, adherence, measurable response; if flat, what changes

Work status and restrictions

Status; specific restrictions with duration; projected return-to-work date

Barriers to recovery and new information

What interferes; new diagnosis, risk, or medication information

Plan and prognosis

Next interventions, frequency, expected duration; authorization via the scheme's channel (CA: RFA)

Clinician signature / credentials: _____ Date signed: _____

Declaration where required (California: under penalty of perjury): _____