315:
Writing Skills for Case Documentation

INSTRUCTOR’S GUIDE

Developed by:
Jonathan Rubin

Revised by:
Elizabeth Neail and Andrea Merovich

Developed for:
The Pennsylvania Child Welfare Resource Center

University of Pittsburgh,
School of Social Work

December 2015
# Agenda for the 1-Day Workshop on 315: Writing Skills for Case Documentation

**Day One**

<table>
<thead>
<tr>
<th>Estimated Time</th>
<th>Content</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 minutes</td>
<td>Section I: Welcome and Introductions</td>
<td>1</td>
</tr>
<tr>
<td>1 hour 10 minutes</td>
<td>Section II: Value of Good Case Records/Documentation</td>
<td>5</td>
</tr>
<tr>
<td>1 hour 30 minutes</td>
<td>Section III: Writing Skills</td>
<td>13</td>
</tr>
<tr>
<td>1 hour 35 minutes</td>
<td>Section IV: Advanced Writing Skills: Relevance and Thoroughness</td>
<td>22</td>
</tr>
<tr>
<td>1 hour 5 minutes</td>
<td>Section V: Skill Building</td>
<td>30</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Section VI: Review and Evaluations</td>
<td>37</td>
</tr>
</tbody>
</table>
Section I: Welcome and Introductions

Estimated Length of Time:
20 minutes

Related Learning Objective:
✓ Explain the importance of clear written communication and relate at least one personal objective for the course

Learning/Performance Objectives:
✓ Cite one personal goal for the course
✓ Identify the competencies and learning objectives for the course

Method of Presentation:
Lecture, individual activity

Materials Needed:
✓ Flip Chart Pads
✓ Flip Chart Stands
✓ Laptop
✓ LCD Projector/Screen
✓ Markers
✓ Masking Tape/Poster Putty
✓ Name Tents
✓ Sharpened pencils (trainer will distribute at the beginning of training and collect at the end of the day to return to Resource Center)
✓ Trainer-Prepared Flip Chart: What’s In It For Me?
✓ Trainer-Prepared Flip Chart: Parking Lot
✓ Handout #1: PowerPoint Presentation 315: Writing Skills for Case Documentation
✓ Participant Guide Page 1: Introduction/Name Tents
✓ Participant Guide Pages 2-3: Agenda/Idea Catcher
✓ PowerPoint Presentation:
  o Slide #1: Title of Curriculum
  o Slide #2: Name Tent
  o Slides #3-4: Learning Objectives
  o Slide #5: Competency
  o Slide #6: Agenda
## Section I: Welcome and Introductions

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Materials</th>
<th>Time</th>
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</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>- Display PPT Slide 1</td>
<td>Name tents</td>
<td></td>
</tr>
<tr>
<td>- Display PPT Slide 2</td>
<td>Participant Guide: Page 1: Introduction/Name Tents</td>
<td></td>
</tr>
<tr>
<td><strong>Introduction</strong></td>
<td>Flipchart</td>
<td></td>
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<tr>
<td><strong>Do:</strong></td>
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<tr>
<td>- Before participants arrive, display <strong>PowerPoint Slide #1 (Title Slide)</strong>.</td>
<td></td>
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</tr>
<tr>
<td>- As participants arrive, welcome them and ask them to complete their name tents following the format below:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Name (Center)</td>
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<td></td>
</tr>
<tr>
<td>o County (Top-Right Corner)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Position (Top-Left Corner)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Number of Years with the Agency (Bottom-Left Corner)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o One thing they want to know about writing skills for case documentation (Bottom-Right Corner)</td>
<td></td>
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<tr>
<td>- Display <strong>PowerPoint Slide #2 (Name Tent)</strong> and refer to <strong>Participant Guide, Page 1</strong>.</td>
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</tr>
<tr>
<td>- After participants have completed their name tents, introduce yourself. Include your name, area of expertise, current position, years of experience, and any other information related to the content.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Ask the participants to introduce themselves to the large group using the information on their name tents. As participants share the one thing they want to learn about writing skills for case documentation, write these thoughts on the <strong>What’s In It For Me? (WIIFM)</strong> flipchart.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Say:</strong> At the end of the training, we will review the WIIFM flipchart to ensure that all of the concepts/questions have been addressed.</td>
<td></td>
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<tr>
<td><strong>Do:</strong> Create a <strong>Parking Lot</strong> flipchart page for those items that will not be addressed/are not addressed in the training. Explain that the items posted on the <strong>Parking Lot</strong> may not be addressed during the training, but you will</td>
<td></td>
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</tbody>
</table>
Section I: Welcome and Introductions

direct them to resources that can meet their needs.

<table>
<thead>
<tr>
<th>Step 2</th>
<th>Training Room Guidelines</th>
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<tbody>
<tr>
<td>Do: Once again refer to Participant Guide, Page 1 and discuss the following training room guidelines:</td>
<td></td>
</tr>
<tr>
<td>o The 15-Minute Rule</td>
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<tr>
<td>o Training Schedule – 9:00 to 4:00 with breaks/lunch</td>
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<td>o Document your presence via the sign-in sheets</td>
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<td>o Provide constructive and motivational feedback</td>
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<td>o Show respect</td>
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<tr>
<td>o Take risks</td>
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</tr>
<tr>
<td>o Practice makes permanent</td>
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<tr>
<td>o Focus on learning – Cell phones on vibrate and only contact office for emergencies</td>
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</tr>
</tbody>
</table>

Ask: What is one thing you want to know or be able to do following this training?

<table>
<thead>
<tr>
<th>Step 3</th>
<th>Learning Objectives/Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do: Review the learning objectives and competencies for the workshop on PowerPoint Slides #3-4 (Learning Objectives) and PowerPoint Slide #5 (Competency).</td>
<td></td>
</tr>
</tbody>
</table>

Say: Writing is a learned skill and it takes time to master it. Even more so with case notes, it is important to be concise and detailed. Often, your supervisor will dictate the desired style or format for your agency’s case documentation.

Ask: Who here uses CAPS? Does anyone else use a different case management system?

Do: Tell participants that the majority of Pennsylvania counties use CAPS, but some use different systems such as KIDS. Lead a brief discussion on how each county uses
### Section I: Welcome and Introductions

Each system differently.

Say: This training won’t train you on your case management technology, but the skills you learn here today will transfer and relate to how you use your county’s system. No matter the case management system you use, you will still need to learn how to write detailed but concise case notes.

|--------|---------------------|-------------------------------------------------|
| Display PPT Slide 6 | Do:  
- Refer participants to their **Participant Guide, Pages 2-3.**  
- Display **PowerPoint Slide #6 (Agenda)** and walk participants through the day’s schedule.  
**Trainer Note:** The *Agenda and Idea Catcher* have been combined on one handout to help participants immediately capture interesting concepts that arise when you train a given section. | 2 |
Section II: Value of Good Case Records/Documentation

Estimated Length of Time:
1 hour, 10 minutes

Related Learning Objective:
✓ Identify the important components of a case record using a sample case note

Learning/Performance Objectives:
✓ Relate the main functions of a case record
✓ Using a sample case record, cite at least five examples of topics that should be found in a thorough case note

Method of Presentation:
Large group discussion, lecture, video, and individual activity

Materials Needed:
✓ Flip Chart Pads
✓ Flip Chart Stands
✓ Laptop
✓ LCD Projector/Screen
✓ Markers
✓ Masking Tape/Poster Putty
✓ Sharpened pencils
✓ Participant Guide Pages 2-3: Agenda/Idea Catcher (revisited)
✓ Participant Guide Pages 4-6: Pennsylvania’s Child Welfare Practice Model
✓ Participant Guide Page 7: Knouse Family Case Record
✓ PowerPoint Presentation:
  o Slide #7: Likes and Dislikes
  o Slide #8: The Importance of Good Case Documentation
  o Slide #9: Getting to Positive Outcomes
  o Slide #10: Think-Pair-Share Activity
  o Slides #11-12: Functions of a Case Record
  o Slide #13: Knouse Family Case Record
### Section II: Value of Good Case Records/Documentation

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Case Documentation</th>
<th>Materials</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td></td>
<td></td>
<td>15</td>
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<tr>
<td>• Display PPT Slide 7</td>
<td><strong>Do:</strong></td>
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<tr>
<td></td>
<td>Display <strong>PowerPoint Slide #7 (Likes and Dislikes)</strong> and ask each participant to list three things they like best about their job and three things they like least about their job. Give participants five minutes to complete their lists.</td>
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<td></td>
<td>Using two separate flipcharts, record from the group’s separate lists of what they like best and least about their jobs.</td>
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<td><strong>Trainer Note:</strong></td>
<td>Ask a volunteer to write the answers on the flipchart, enabling the trainer to facilitate discussion.</td>
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<td></td>
<td>The list of things participants like least might include such items as: paperwork, computer work, going to court, being stuck in the office, driving, and going to training. Feelings about completing service plans, risk assessments, and other case documents should all be gathered from the group.</td>
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<td></td>
<td>Participants will most likely identify paperwork and other case documentation activities on the flipchart of things they like least. Be prepared for some individuals to say that they like this part of the job and acknowledge the strengths they bring to this session.</td>
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<td></td>
<td><strong>Ask:</strong> Why do you feel completing case documentation can be a chore?</td>
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<tr>
<td><strong>Trainer Note:</strong></td>
<td>Some may say it’s the lack of time or the nature of the work (solitary or boring).</td>
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<td></td>
<td><strong>Do:</strong> Review the list of things participants like best about the job. Some answers may include client contacts, helping people, and working with the public. Recognize that “paperwork” probably is on very few, if any, lists.</td>
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</table>
# Section II: Value of Good Case Records/Documentation

<table>
<thead>
<tr>
<th>Step 2</th>
<th>Importance of Good Case Documentation</th>
<th>Participant Guide: Pages 4-6, PA’s Child Welfare Practice Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Display PPT Slide 8</td>
<td>Do: Ask participants what tools they use for case documentation. They might mention:</td>
<td>10</td>
</tr>
<tr>
<td>● Display PPT Slide 9</td>
<td>● Risk assessments</td>
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<td>● Family Service Plans</td>
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<td>● Case summaries</td>
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<td>● Safety plans</td>
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<td>● Court petitions/narratives</td>
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<td>● Ongoing case notes</td>
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<td>● Home visits</td>
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<td></td>
<td>● Phone calls</td>
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<td></td>
<td>● Any client contact</td>
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<td></td>
<td>● CY 48 (Child Protective Service Investigation Report Form)</td>
<td></td>
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<tr>
<td></td>
<td>● CY 104 (Report of Suspected Child Abuse to Law Enforcement Officials)</td>
<td></td>
</tr>
<tr>
<td>Do: Display <strong>PowerPoint Slide #8 (The Importance of Good Case Documentation)</strong>. Explain that complete and thorough case documentation results in better information of other tools they might use during the life of a case.</td>
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<td></td>
</tr>
<tr>
<td><strong>Trainer Note:</strong> The Practice Model may be a new concept to many participants. It is important to make the connection between child welfare practice and the values, principles, and skills explained in the model. See the trainer resource at the end of this step for more information.</td>
<td><strong>Trainer Note:</strong> The Practice Model may be a new concept to many participants. It is important to make the connection between child welfare practice and the values, principles, and skills explained in the model. See the trainer resource at the end of this step for more information.</td>
<td></td>
</tr>
</tbody>
</table>
Section II: Value of Good Case Records/Documentation

Do:
- Ask participants if they are familiar with Pennsylvania’s Child Welfare Practice Model, which guides children, youth, families, child welfare representatives, and other child and family service partners in working together, providing a consistent basis for decision making; clear expectations of outcomes, shared values and ethics; and a principled way to evaluate their own skills and performance.
- Display PowerPoint Slide #9 (Getting to Positive Outcomes), which depicts the key components of PA’s Child Welfare Practice Model.
- Refer to Participant Guide, Pages 4-6 and discuss PA’s Child Welfare Practice Model.

Say: The application of Pennsylvania’s Child Welfare Practice Model shapes and improves our ability to engage and serve the children, youth, and families of our state. The model delineates the outcomes, values and principles, and essential skills of successful child welfare practice.

Ask: How do you think good case documentation might help child welfare professionals attain the values, principles, and skill detailed in Pennsylvania’s Child Welfare Practice Model?

Trainer Note: Answers might include:
- Able to attain the outcomes outlined in the Practice Model. Good case documentation can ensure:
  - Safety
  - Permanence
  - Family ability to meet child/youth’s needs
  - Access to services
  - Strengthened families
  - Accountability of child welfare professionals to assure child-centered, family-focused services with positive
Section II: Value of Good Case Records/Documentation

outcomes

- Good case documentation will also support the skills needed to achieve the desired outcomes. Documentation can help with:
  - Engagement with the family, children, youth, and all team members
  - Teaming with others throughout the phases of change
  - Gathering and sharing information so the team has a common big picture of the strengths, challenges, and underlying issues
  - Application of information to inform planning
  - Implementation of supports, services, etc.
  - Analyzing and evaluating the impact and effectiveness of the plan implementation and the ability to modify in response to changes

Trainer Resource: Section II, Step 2: Letter to Trainers Explaining Practice Model Use

Pennsylvania has established a Child Welfare Practice Model. Practice models guide performance and clearly link the abstract ideals of mission, vision, and strategic plans to day-to-day practice. Pennsylvania’s Child Welfare Practice Model guides children, youth, families, child welfare representatives, and other child and family service partners in working together, providing a consistent basis for decision making; clear expectations of outcomes, shared values and ethics; and a principled way to evaluate their own skills and performance.

Application of Pennsylvania’s Child Welfare Practice Model shapes and improves our ability to engage and team with the children, youth, and families served by our Child Welfare system. The model delineates the outcomes, values and principles, and essential skills of quality child welfare practice. Pennsylvania’s Child Welfare Practice Model involves a team approach, and emphasizes modeling the values and principles of child welfare practice at every level and across all partnerships.

Pennsylvania’s Child Welfare Practice Model promotes teams to work together to achieve and maintain six key outcomes:

- Safety from abuse and neglect.
- Enduring and certain permanence and timely achievement of stability, supports, and lifelong connections.
- Enhancement of the family’s ability to meet their child/youth’s wellbeing, including physical, emotional, behavioral, and educational needs.
- Support families within their own homes and communities through comprehensive and accessible services that build on strengths and address individual trauma, needs and concerns.
- Strengthened families that successfully sustain positive changes that lead to safe, nurturing, and healthy environments, and
- Skilled and responsive child welfare professionals, who perform with a shared sense of accountability for assuring child-centered, family-focused policy, best practice, and positive outcomes.
Pennsylvania’s Child Welfare Practice Model cites and describes values and principles in seven areas, enumerating and carrying into practice our belief in:

- Children, Youth and Families;
- Community;
- Honesty;
- Cultural awareness and responsiveness;
- Respect;
- Teaming; and
- Organizational excellence.

The Practice Model also describes six skills essential to achieving our desired outcomes:

- **Engaging**, or establishing and maintaining relationships;
- **Teaming**, or collaborating with others, including the family, in a unified effort throughout all phases of the change process;
- **Assessing and Understanding**, or gathering and sharing information to fully inform the team, and using that information to keep the team’s understanding current and comprehensive;
- **Planning**, or developing strategies and supports to achieve goals;
- **Implementing**, or actively performing roles to produce sustainable results; and
- **Monitoring and Adjusting**, or continuously evaluating effectiveness and modifying until goals are achieved.

This model of practice will be incorporated into all new and revised Child Welfare Resource Center (CWRC) curricula. Please begin to familiarize yourself with PA’s Child Welfare Practice Model by reviewing the following as you will see the materials in your training and/or consulting room:

- PA’s Child Welfare Practice Model
- PA’s Child Welfare Practice Model (visual aid)

In addition, you can find more information about PA’s Child Welfare Practice Model at: [http://www.pacwrc.pitt.edu/PracticeModel.htm](http://www.pacwrc.pitt.edu/PracticeModel.htm).

If you have questions about the use of the Practice Model, please do not hesitate to contact Sharon England at sse8@pitt.edu.

### Think, Pair, Share Activity: Functions of a Case Record

**Do:**

- Display **PowerPoint Slide #10 (Think-Pair-Share Activity)** and ask participants to find a partner and give the pairs 10 minutes to come up with a list of what they think are the main functions of a case record.

- Ask pairs to share their list, while you record the answers on flipchart to then hang in the training room. Answers might include:
  - Provides a history of case activity for the future
  - Documents how a family has responded in the past to agency intervention
  - Documents decision making
## Section II: Value of Good Case Records/Documentation

- Measure client progress
- Means of communication to future service providers
- Evidence in court testimony
- Supports worker in the event of client challenges
- Assures services to the child
- Provides means of supervision
- Allows worker opportunity to process case decisions
- Provides for cultural competence assurances
- Allows worker to look for patterns
- Provides information in absence of a worker
- Provides background on the child/family, i.e. medical history, criminal history, mental health history, etc.
- Provides a timeline of events
- Allows for smooth transfer of information from one child welfare professional to another

- Display **PowerPoint Slides #11-12 (Functions of a Case Record)** and compare to the answers the participants provided.

### Step 4
- Display PPT Slide 13

<table>
<thead>
<tr>
<th><strong>Case Documentation Use</strong></th>
<th><strong>Participant Guide:</strong> Page 7: Knouse Family Case Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do: Explain to participants that it is not only important to think about how their case record will be used, but also who might review their case records.</td>
<td></td>
</tr>
<tr>
<td><strong>Ask:</strong> Who might make use of your case records?</td>
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<tr>
<td><strong>Trainer Note:</strong> Responses might include:</td>
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<tr>
<td>• Colleagues</td>
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<tr>
<td>• Supervisor</td>
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<tr>
<td>• Solicitor/agency attorney/guardian ad litem</td>
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<tr>
<td>• Physicians/medical personnel</td>
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<tr>
<td>• Police</td>
<td></td>
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<tr>
<td>• Judges</td>
<td></td>
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<tr>
<td>• The person who is the subject of the care</td>
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</tbody>
</table>
Section II: Value of Good Case Records/Documentation

<table>
<thead>
<tr>
<th>record</th>
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</thead>
<tbody>
<tr>
<td>Parent/Guardian</td>
</tr>
<tr>
<td>Foster/Adoptive parents</td>
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<tr>
<td>Public agencies in other states</td>
</tr>
</tbody>
</table>
(Child Welfare Information Gateway, 2013)

Do:

- Display PowerPoint Slide #13 (Knouse Family Case Record) and refer to Participant Guide, Page 7.
- Ask participants to divide themselves into small groups of 2-4 members and review the case record.
- Tell them that they have recently taken over this case and are reviewing the case record in preparation for meeting the Knouse family for the first time.
- After reviewing the notes, ask participants to identify the important information missing from this case record. Ask them to think not only in terms of what information would help them as case workers, but also what information might help anyone else who might make use of the case record.
- Once complete, ask participants to share their list while you record responses on a flip chart. Some responses might include:
  - Family history
  - Services provided and results
  - Family relationships
  - General observations
  - Family characteristics
  - Family strengths
Briefly review the list of who might make use of their case records.

Step 5 Agenda/Idea Catcher

Do: Conclude section by asking participants to take five minutes to reflect upon the materials and highlight any areas they might want to note for improvement. Refer to Participant Guide, Pages 2-3 and ask participants to capture key learning points from this section of the training. Ask participants to share what they wrote.
315: Writing Skills for Case Documentation

Section III: Writing Skills

Estimated Length of Time:
1 hour, 30 minutes

Related Learning Objectives:
✓ Use the Basic Writing Skills Resource Guide to proof, improve, and correct a paragraph from a case note
✓ Explain at least one advantage of a properly sequenced case note

Learning/Performance Objectives:
✓ Using the Basic Writing Skills Resource Guide, identify and correct five sentences with unclear pronoun use
✓ In small groups, create a presentation that includes a brief explanation, three helpful hints, and a sample sentence on the apostrophe, number rules, quotations marks, or run-on sentences using the Basic Writing Skills Resource Guide
✓ Using a video interview, relate the sequence of the main events of one interviewee

Method of Presentation:
Lecture, large group discussion, small group activity, and individual activity

Materials Needed:
✓ McAbee Case Scenario (DVD)
✓ Flip Chart Pads
✓ Flip Chart Stands
✓ Laptop
✓ LCD Projector/Screen
✓ Markers
✓ Masking Tape/Poster Putty
✓ Handout #2: Basic Writing Skills Resource Guide
✓ Handout #3: McAbee Case Scenario
✓ Participant Guide Pages 2-3: Agenda/Idea Catcher (revisited)
✓ Participant Guide Pages 8-9: Writing Skills Exercise
✓ Participant Guide Page 10: McAbee Case Scenario Notes
✓ Appendix #1: Miller Family Case Summary (one envelope per table)
✓ PowerPoint Presentation:
  o Slide #14: When We Speak...
  o Slide #15: When We Read...
  o Slide #16: Remember That...
  o Slide #17: Pronouns: Example #1
  o Slide #18 - #20: Pronoun Sample Sentences
  o Slides #21-22: Writing Skills Exercise
  o Slide #23: McAbee Case Scenario: Sequencing Activity
### Section III: Writing Skills

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Display PPT Slide 14</td>
<td>Writing Skills</td>
</tr>
<tr>
<td>- Display PPT Slide 15</td>
<td>Say: One way to ensure clear, valuable case notes is the proper use of grammar, punctuation, and clearly written, well-structured sentences.</td>
</tr>
<tr>
<td>- Display PPT Slide 16</td>
<td>Do: Explain that the focus of this section will be on pronouns, apostrophes, quotation marks, numbers, and organization/sequencing.</td>
</tr>
</tbody>
</table>

**Trainer Note:** Emphasize that there is a three-hour course that delves more deeply into writing skills, titled 315: Basic Writing Skills, which covers topics such as spelling, grammar, punctuation, and sentence and paragraph construction. This section will cover higher level writing issues.

**Do:**
- Explain that we often write like we speak. Ask participants what the dangers of writing like we speak might be?
- Display **PowerPoint Slide #14 (When We Speak).**

Say: Al Zale, of the University of Montana, describes the differences in the way we speak and the way we read in his article “How to Write Good: Technical Writing Tips” (2004). He explains that when we speak, our sentences tend to be very complex, convoluted, qualified with adorning phrases (i.e. “um,” “okay,” “ya know,” etc.), and usually conform to the way we listen. Tone, voice quality, emphases, and facial expressions all convey the speaker’s intent.

**Do:**
- Ask participants how reading and writing might be different from speaking, either in a formal setting (i.e. giving a speech) or in conversation.
- Display **PowerPoint Slide #15 (When We Read).**
### Section III: Writing Skills

Say: Zale explains that the mind expects simple, declarative, straightforward sentences when we read.

**Do:**
- Inform them that they want to stay away from flowery, complex language and strive to keep sentences simple and straightforward while still being thorough in their documentation.
- Display **PowerPoint Slide #16 (Remember That...)** and reiterate that quality case documentation is truly a skill and that it takes practice to master it.

### Step 2

<table>
<thead>
<tr>
<th><strong>Pronouns</strong></th>
<th><strong>Handout #2:</strong> Basic Writing Skills Resource Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ask: Do you remember any writing or grammar rules from school? Do you remember anything about pronouns? Are you aware of why proper pronoun use is important?</td>
<td>20</td>
</tr>
<tr>
<td>Do: Refer participants to <strong>Handout #2: Basic Writing Skills Resource Guide.</strong> Explain that this tool can serve as a guide after today’s session and includes information on various grammatical and structural issues that participants might be faced with when writing.</td>
<td></td>
</tr>
<tr>
<td>Say: Because pronouns take the place of and refer back to a noun (person, place, or thing) they must be used clearly or the original intent of the writer may be lost.</td>
<td></td>
</tr>
<tr>
<td>Imagine that your case record is being read a year from now in your absence. If your original intent of a “he” or a “she” is lost then your whole dictation, and possibly all of your casework efforts, could be rendered meaningless.</td>
<td></td>
</tr>
<tr>
<td>Do: Display <strong>PowerPoint Slide #17 (Pronouns: Example #1)</strong> and ask a participant to read the short narrative out</td>
<td></td>
</tr>
</tbody>
</table>
Section III: Writing Skills

loud:
- Stephanie and Layla were best friends until she began to spread rumors about her. She stated that she made going to school unbearable, which is why she became truant. Her mother, Anna, claims they were best friends. She is unaware of any falling out between them. She reported that she is always “upfront and honest” with her about everything.

Ask: Who are “she” and “her” referring to throughout the narrative? Who is “they” referring to throughout the narrative?

Do:
- Tell participants that this type of writing is not unusual in case dictations where the writer knows what they are saying, but does not recognize that the reader may be confused by the use of multiple pronouns.
- Continue this discussion by displaying PowerPoint Slides #18-20 (Sentences #1-3), which display five sentences that each contain an unclear pronoun. As a large group, participants will identify the unclear pronoun and provide suggestions on how they might rewrite the sentence.
- Direct participants to page 31 (Pronoun Agreement) of the Handout #2: Basic Writing Skills Resource Guide for more information on pronouns.
  - **PowerPoint Slide #18:** Lori, Amanda, and Jen all live in the same house, but sometimes she spends the night with her father.
  - **PowerPoint Slide #19:** John spoke with William because he wants him to go to anger management classes.
  - **PowerPoint Slide #20:** Bobby and Glenn were both removed from their home on January 14, 2014, however he wants to go back.
Section III: Writing Skills

Trainer Note: Suggestions for rewritten sentences may vary due to the different people pronouns could be referring to. The sentences provided are vague and should encourage discussion about the proper use of pronouns. Trainer should facilitate this discussion, pointing out how difficult it can be to use pronouns properly.

Ask: During this exercise, did you notice any improper use of pronouns in your own writing?

Step 3
- Display PPT Slides 21-22

Writing Skills Exercise
Ask: Do you know how to correctly use apostrophes or question marks? Can you identify a run-on sentence? Do you know when to spell out a number versus writing the numerical form?

Do: See activity instructions below and run activity.

Handout #2: Basic Writing Skills Resource Guide

Participant Guide: Pages 8-9: Writing Skills Exercise

Instructions for the Trainer: Section III, Step 3: Writing Skills Exercise

Type of Activity/Purpose
Jigsaw
During a jigsaw activity, participants will split into groups, become the “expert” on a given topic, and then present their information to a second small group or to the large group.

Set-up and Alternatives
This activity uses the Handout #2: Basic Writing Skills Resource Guide, pages 3, 24, and 33 and PG, pages 8-9 (Writing Skills Exercise).

Facilitation Tasks
Do:
- Direct participants to the Handout #2: Basic Writing Skills Resource Guide, page 3, 24, and 33.
- Display PowerPoint Slides #21-22 (Writing Skills Exercise)
- Break participants into four evenly sized groups and assign each one either “The Apostrophe,” “Number Rules,” “Quotation Marks,” or “Run-On Sentences.”
- Direct participants to PG, pgs. 8-9 (Writing Skills Exercise) and request that each group become the “expert” on their given topic. Together they will record on PG, pgs. 8-9, a brief explanation, three helpful hints, and a sample sentence.
- Ask the group to count off by the total number of people per small group. For example: if there are four people per small group, count off around the room by four.
- Next ask participants to re-group based on his/her number. For example: all of the one’s in one group, all of the two’s in another group, etc. The purpose of this is the have one expert per topic in a small group. If there is a group that does not have one expert per topic, ask those small group members to join another group.
Once in this second small group, instruct participants to teach their given topics to this second small group. Participants should complete PG, pgs. 8-9 (Writing Skills Exercise) during these teach-backs.

**Debrief**

Ask: Have you noticed any issues with these grammar rules in your own writing?
Say: If you have any lingering questions about any grammar or punctuation topics, you might want to consider taking 315: Basic Writing Skills.

**Additional Notes**

While participants work, the trainer should walk around the room answering questions as they come up. When groups present their information, the trainer should facilitate conversation or questions that arise.

---

**Step 4 Sequencing**

Do:
- Inform participants that in addition to proper grammar and punctuation, correct sequencing of events will support accurate and thorough case notes.
- Ask participants how they remember the sequence of events during a home visit or a phone call with a parent.
- Distribute Appendix #1 to the group, one envelope per table. Ask participants to read each of the paragraph strips found inside the envelope and to then organize those paragraphs in correct order. (For the correct order, see the trainer resource below.)

Ask:
- How did you feel about this activity? Was it frustrating having each piece of the case summary out of sequence?
- How can participants ensure proper sequencing when they sit down to write?

Do: Suggest that participants take notes, writing down things as they occur during a client contact.

Say: By preparing properly sequenced notes, you can properly sequence your case record. If you are unable to take notes during an interview, phone conversation, or a visit, you should take the time immediately after the contact to outline the sequence of events that happened during your contact.

**Appendix #1**:
Miller Family Case Summary (one per table)
Section III: Writing Skills

Do: Reiterate that immediate notation after client contact makes for better, more accurate, and clearly understandable dictation.

<table>
<thead>
<tr>
<th>Trainer Resource: Section III, Step 4: Sequencing Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miller Family Case Summary</td>
</tr>
</tbody>
</table>

The Miller family was referred to the agency after an anonymous report raised concerns for the welfare of John Miller. John Miller was later placed in an agency approved foster home while his family worked on their issues. Mr. and Mrs. Miller displayed open hostility towards this caseworker, which made working with them difficult.

During this worker's meeting with John, he appeared anxious. John had trouble maintaining eye contact and often got up from his seat and paced while we spoke. John told me meeting with him made him nervous. He expressed that it was his fault that everything happened the way it did and he didn't like meeting with me for fear he would get someone into trouble.

The agency filed in indicated abuse report naming Mr. Miller as perpetrator since he broke a rib on his son John. Mr. Miller was arrested for the incident and is still awaiting trial. He will most likely receive two-three years on probation.

Mr. Miller successfully completed an alcohol evaluation and has begun treatment at The Alcoholics Counseling Center (TACS). TACS counselor, Joe Jenkins, has been in communication with his worker and has found Mr. Miller doing well in treatment.

John returned home from foster care nine months after his original placement. At that time, Mr. and Mrs. Miller had completed all of the objectives listed on their plan. John has been home for six months now and things are stable in the home. While in foster care, John stayed in the Dugan foster home. He didn’t think foster care was a good experience.

John’s schoolwork has been greatly improved since returning home compared to his work while in foster care. His attendance has been perfect and he has gotten all As and Bs on his report card for the last two marking periods. Mr. and Mrs. Miller have attributed that improvement to their being more interested in John's schoolwork and their hiring of a tutor to assist John after school.

Since John’s placement, the Millers have cooperated with the agency’s imposed safety plans that included supervised visits for Mr. Miller. Since John has been home, the safety plan has included Mr. Miller and John never being home alone, Mr. Miller being in treatment, and John knowing to call the police or go to his neighbors if he felt threatened. Since all of the family service plan objectives have been completed, John is considered safe at home. After missing three of our first four scheduled appointments, the Millers have not missed an appointment since John has returned home six months ago.

Step 5
- Display PPT Slide 23

Sequencing: McAbee Case Scenario DVD (9 minutes, 19 seconds)

Do:
- Display PowerPoint Slide #23 (McAbee Case Scenario: Sequencing Activity) and divide participants into small groups.
- Play McAbee Case Scenario DVD (9 minutes, 19 seconds) and inform McAbee Case Scenario DVD Participant Guide: Page 10: McAbee Case Scenario Notes 25
participants to pay particular attention to the sequence of events that occur during Kanesha’s interview with Samantha. Instruct participants to write down the main events discussed in the correct sequence that the interviewee mentions them on Participant Guide Page 10.

- When the video is over, ask each group to compare notes and identify an agreed upon list of sequenced events.
- After the small groups are finished, lead a large group discussion to compile an agreed upon sequence of events. Record the sequence on a flipchart. (See the trainer resource below of an example of what the group might come up with)
- After the large group has agreed upon the sequence of events, distribute Handout #3 (Sequencing: McAbee Case Scenario). This is an example of what the group might come up with. The content is the same in the trainer resource below.

Ask: Is there anything you wouldn’t put in here?

**Trainer Note:** If the topic of supervisor preference arises, acknowledge that the supervisor preference in case documentation style will impact how child welfare workers write their case notes. However, concise and detailed writing is something that should be present in case documentation, regardless of supervisor style preference.

<table>
<thead>
<tr>
<th>Trainer Resource: Section III, Step 5: Sequencing: McAbee Case Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below is an example of what the group might come up with:</td>
</tr>
<tr>
<td>1. Samantha expresses concerns about being interviewed alone.</td>
</tr>
<tr>
<td>2. Samantha met her boyfriend, Sean Haslett, about three years ago through her cousin. Sean is her cousin’s boyfriend’s brother.</td>
</tr>
<tr>
<td>3. Samantha confirms that Sean is not Molly’s father.</td>
</tr>
<tr>
<td>4. Molly does not currently have a relationship with her father because he is in jail.</td>
</tr>
<tr>
<td>5. Samantha again explains that she has been with Sean for about three years and living with him for about six months.</td>
</tr>
<tr>
<td>6. When asked specific questions, Samantha seems hesitant to talk about Sean in any way.</td>
</tr>
<tr>
<td>7. Samantha knows that it is not okay to leave Molly alone, even for a few hours.</td>
</tr>
</tbody>
</table>
| 8. Samantha explains that she could not tell Sean that she is not coming to see him at work because she can’t leave Molly alone. Samantha states, “He gets mad and I just don’t like it when he gets
Section III: Writing Skills

mad."

9. Samantha hesitates to answer questions regarding other concerns or if she has ever been afraid of Sean.
10. Samantha confirms that Sean has pushed her a couple of times, explains that she has pushed him back.
   a. When asked if she did push him back, Samantha states, “No, but I wanted to.”
11. Samantha finally confides that Sean hits her, yells at her, and calls her names. She explains that Sean gets mad when she “doesn’t do what she’s supposed to do.”
12. Samantha has been afraid for Molly’s safety “a couple of times.”
   a. Sean gets mad if Molly doesn’t do what she is supposed to do. Samantha explains that Sean gets so mad that she is afraid of what will happen if he “gets his hands” on Molly.
   b. Samantha gets in front of Sean when he goes after Molly.
   c. Samantha makes sure that Molly and Sean are never at home alone together.
13. Molly is outside a lot by herself to prevent something happening to her. Samantha tries to send Molly to her sister’s house, but Molly wants to go outside instead.
14. Sean has stopped Samantha from going to church altogether. Samantha has to come home from her part-time job as soon as she is finished. Samantha explains that she “needs to be at home when he arrives from work.”
15. Sean has also prevented Samantha from seeing friends and family. Samantha states, “I don’t have any friends anymore.”
16. Samantha feels that her sister most likely knows what’s going on, even though Samantha has never said anything to her. Samantha does not have any contact with the rest of her family.
17. Samantha explains that she has not told anyone else about the abuse.
18. Samantha’s neighbors called the police once, but she told them everything was okay and sent them away.
19. Samantha has not attended counseling sessions or spoke with anyone who might be able to help at her church.
20. When asked about the possibility of attending a support group, Samantha explains that she could never do “anything like that. Sean wouldn’t let me.”
21. Samantha has gone to the hospital a few times due to the abuse.
   a. Sean broke her arm once, but states, “he didn’t mean to do it.”

Step 6
Agenda/Idea Catcher
Do:
- Conclude this section by asking participants to take five minutes to reflect upon the materials and highlight any areas they might want to note for improvement.
- Direct them to Participant Guide, Pages 2-3 to capture key learning points from this section of the training.
- Ask participants to share what they wrote.
315: Writing Skills for Case Documentation

Section IV: Advanced Writing Skills: Relevance and Thoroughness

Estimated Length of Time:
1 Hour, 35 Minutes

Related Learning Objectives:
✓ Identify the importance of objectivity and the use of facts in a case note
✓ Explain at least one advantage of a thoroughly documented case note

Learning/Performance Objectives:
✓ Correctly identify fact from opinion on a worksheet of personal statements
✓ Expand 1-2 general statements using facts from a video interview

Method of Presentation:
Large group discussion and small group activity

Materials Needed:
✓ The Martin Family
  o Scene 4: 2 minutes
  o Scene 5: 5 minutes
  o Scene 12: 2 minutes
✓ DVD/VHS Player
✓ External Speakers for Laptop
✓ Flip Chart Pads
✓ Flip Chart Stands
✓ Laptop
✓ LCD Projector/Screen
✓ Markers
✓ Masking Tape/Poster Putty
✓ TV
✓ Handout #2: Basic Writing Skills Resource Guide (revisited)
✓ Participant Guide Pages 2-3: Agenda/Idea Catcher (revisited)
✓ Participant Guides Page 11-12: What to Record
✓ Participant Guide Page 13: Distinguishing Fact and Opinion
✓ Participant Guide Page 14: Martin Family Case Vignettes Notes
✓ Participant Guide Page 15: Use of Language
✓ Participant Guide Page 16: Effective Documentation
✓ PowerPoint Presentation:
  o Slide #24: What to Record Brainstorm
  o Slide #25: Case Fact from Case Opinion: Example #1
  o Slide #26: Case Fact from Case Opinion: Example #1 (continued)
  o Slide #27: Avoid General Statements
  o Slide #28: Use of Language: The Martin Family
## Section IV: Advanced Writing Skills: Relevance and Thoroughness

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Materials</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td><strong>Barriers/What to Record</strong></td>
<td><strong>Participant Guide</strong> Pages 11-12: What to Record</td>
</tr>
<tr>
<td>• Display PPT Slide 24</td>
<td>Do: Explain that in the last section they reviewed structural issues in their writing such as grammar, punctuation, and sequencing.</td>
<td>Flipchart</td>
</tr>
<tr>
<td></td>
<td>Say: This next section will delve deeper into the content being written into case records.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ask: Do you believe there can be <em>too much</em> information in a case record?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Do:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Explain that as important as it is to be thorough in their case notes, it is equally important to only record relevant information.</td>
<td></td>
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<tr>
<td></td>
<td>• Display <em>PowerPoint Slide #24 (What to Record Brainstorm)</em> and split group in half. Give each group a piece of flipchart paper.</td>
<td></td>
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<tr>
<td></td>
<td>• Give the two groups five minutes to create a list of what they believe is important to include in case notes.</td>
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<td></td>
<td>• When complete, display the two flipchart papers and compare the two lists. Discuss any differences with the group. Some responses might include:</td>
<td></td>
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<tr>
<td></td>
<td>o Dates and times of contact with the client or individuals involved with the client</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Type of contact</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Description of services provided directly or by referral</td>
<td></td>
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<tr>
<td></td>
<td>o Significant events, such as death, illness, marriage, divorce, change in family or household configuration, relationship stressors, etc.</td>
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<tr>
<td></td>
<td>o Explaining why continued placement is appropriate or why returning the client to the family is recommended</td>
<td></td>
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<tr>
<td></td>
<td>• Refer to <em>Participant Guide, Pages 11-12</em> and briefly review with the group.</td>
<td></td>
</tr>
</tbody>
</table>
**Section IV: Advanced Writing Skills: Relevance and Thoroughness**

<table>
<thead>
<tr>
<th>Ask:</th>
<th>How many of you struggle with what to document in your case narratives? How do you determine what is important?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do:</td>
<td>Ask the same questions above for case dictation, closing, and transfer summaries.</td>
</tr>
<tr>
<td>Say:</td>
<td>The demanding schedule of a caseworker requires that documentation be done in an economic manner. At the same time, documentation must be thorough and complete.</td>
</tr>
<tr>
<td>Do:</td>
<td>Remind participants that they should strive to keep sentences simple and straightforward, document the sequence of events from client contact, and stick to relevant information in order to have complete and thorough case notes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Display PPT Slide 25</td>
</tr>
<tr>
<td>● Display PPT Slide 26</td>
</tr>
<tr>
<td>● Display PPT Slide 27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objectivity and Factual Observation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do:</td>
</tr>
<tr>
<td>● Explain that one way of keeping documentation relevant is by only recording factual information, leaving opinions and bias out.</td>
</tr>
<tr>
<td>● Display PowerPoint Slide #25 (Case Fact from Opinion: Example #1).</td>
</tr>
<tr>
<td>o PowerPoint Slide #25: Mr. Brown was obviously drunk when he showed up for his visit.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ask:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● What is the problem with this statement? Is this fact or is it an opinion?</td>
</tr>
<tr>
<td>● How could this sentence be written more clearly to convey objectivity and factual observation?</td>
</tr>
<tr>
<td>● What type of things might you have noticed about Mr. Brown to lead you to believe he was drunk?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● After discussion, display PowerPoint Slide #26 (Case Fact from Opinion: Example #1 (continued) and ask</td>
</tr>
</tbody>
</table>
Section IV: Advanced Writing Skills: Relevance and Thoroughness

participants to detail the differences between the first sentence on the previous slide and the second sentence.

- Ask participants where they think opinions, in general, come from. Explain that many opinions stem from stereotypes and biases found deeply ingrained in our culture. They can be handed down from parents, teachers, grandparents, etc.
- Direct them to page 37 of Handout #2: Basic Writing Skills Resource Guide for more information on stereotypes and biased language.
- Explain the importance of recording only objective, factual statements. The consequences of putting too much opinion and too little fact into case records are potentially severe.

Say: Case notes should focus on observable and relayed information only – there is no room for opinion.

Ask: Do you believe it is ever appropriate to include an opinion in a case note? Why or why not?

**Trainer Note:** In case participants should say opinion is appropriate in a case note, remind them that opinion is never appropriate in a case note. Facts trump opinion.

**Do:**
- Direct participants to Participant Guide, Page 13 and ask them to complete each sentence individually, writing down the first thing that comes to mind.
- Next ask them to review what they wrote with a partner, deciding which sentences contain fact and which contain opinion.

Ask: How many of your sentences contained opinions? What did you learn in regards to how you write about different groups of people?
## Section IV: Advanced Writing Skills: Relevance and Thoroughness

**Do:**
- Emphasize that using concrete language is the key to objective and factual writing.
- Display PowerPoint Slide #27 (Avoid General Statements).

**Say:** Avoid general statements like “he looked tired” when you could write, “he seemed to have trouble keeping his eyes open and yawned several times during the interview.”

**Ask:** What is a better way to write “the house was dirty” in a case record?

**Do:** Ask participants to explain the connection between avoiding general statements and sticking to facts in their case records.

### Step 3
- Display PPT Slide 28

**The Martin Family Case Vignettes**

**Do:** Direct participants to Participant Guide, Page 14.

**Say:** I am going to show you three scenes of the Martin family. Please use page 14 in your Participant Guide to take notes from the video as if you were the caseworker.

**Do:** Show participants the Martin Family Case Vignettes: Scenes 4, 5, and 12 (Can be found here – http://www.ccfcs.sc.edu/47-designing-solutions/359-child-welfare-basic-training-vignettes.html, but also on DVD).

**Trainer Note:** As participants view this video, there may be different or dissenting opinions on the issue of neglect portrayed in some of the clips. The trainer should acknowledge participants’ concerns, but encourage them to focus on the video in relationship to the activity.

**Do:**
- Divide the group into groups of 2-5 participants.
## Section IV: Advanced Writing Skills: Relevance and Thoroughness

- Refer each group to **Participant Guide, Page 15**.

Say: This handout has statements that a typical caseworker may write after completing a home visit. The statements on this handout are specific to the Martin family scenes we just watched.

**Do:**
- Display **PowerPoint Slide #28 (Use of Language: The Martin Family)**.
- Assign each group one or two of the phrases depending on the number of groups.
- Ask them to identify the problem with the given phrases, then rewrite the provided phrases incorporating the knowledge they have gained so far in this training.
- Ask each group to put their revised phrases on flipchart paper.
- Allow for 10 minutes for this activity, then ask groups to hang up their flipchart papers.

**Trainer Note:** If having technical difficulties and unable to play the vignettes, this exercise can be done from a more general perspective by asking participants to review the phrases without the context of the video clips. However, watching the video is the preferred way to process this activity.

### Step 4

**Use of Language Review (Debrief)**

Do: Ask a member from each group to present what they wrote to the large group. After each group’s report-out, ask the large group if they noted other ways to rewrite these phrases. Use these phrases to review all of the previously listed concepts. (See the trainer resource below for examples of possible answers.)

Ask: What questions do you have for me?

**Do:** Refer to **Participant Guide, Pages 16-17**

**Participant Guide:** Pages 16-17: Effective Documentation
Section IV: Advanced Writing Skills: Relevance and Thoroughness

and review the written concepts with the group.

Trainer Resource: Section IV, Step 4: Use of Language Review (Debrief)

Below are the given phrases with some examples of possible answers:

1) Ms. Martin seemed irritable.

   Mrs. Martin raised her voice when she asked about who reported her, calling her neighbor “that nosey bitch.” She also raised her voice stating, “I don’t need this. Everybody’s got something to say about how I run my business.”

2) The house was very dirty.

   There were old beer cans, trash, and empty pizza boxes on the floor of the home. There was trash piled up in front of the house.

3) Kenny was angry.

   When Ms. Martin told Kenny, her boyfriend, that this worker was from DHS, he stated that Jayden and Angel aren’t his kids. Kenny yelled, “You know damn well I’m not signed on for this” at Ms. Martin then abruptly left.

4) Jayden and Angel’s biological fathers are absent.

   Ms. Martin explained that Jayden’s father lives in Charlotte with his wife and other children. Jayden’s father has no contact with Jayden. Angel’s father is in prison, however Ms. Martin keeps in contact with him and his family, stating that “Reno was really good to us.”

5) Ms. Martin might have a substance abuse problem.

   Ms. Martin admits to having parties where there is drinking. She claims she does not use drugs, but states that she doesn’t know what Kenny and his friends do. Ms. Martin explains that these parties happen mostly on the weekends, but may also occur on weeknights as well.

6) Ms. Martin’s appearance was unkempt.

   Ms. Martin’s hair was not brushed and in her face. Her make-up was smeared below her eyes, which were puffy and red.

7) Jayden and Angel are largely unsupervised.

   When asked what Jayden and Angel do during the parties Ms. Martin hosts with her boyfriend, Kenny, Ms. Martin explains that they go play or go outside, and finally states, “I don’t know, they do what boys do.”

8) Ms. Martin’s mother is a main source of support.

   Ms. Martin’s mother is very involved with Jayden and Angel’s everyday life. She encourages Ms. Martin to be more involved in their lives and to support their interests and academics.
Section IV: Advanced Writing Skills: Relevance and Thoroughness

9) Ms. Martin appeared more concerned about meeting her own needs than Jayden and Angel's needs.

Ms. Martin watches television while ignoring Jayden and Angel. When Ms. Martin’s mother encourages her to interact with the boys, she rolls her eyes, sighs heavily, and exclaims that they are getting on her nerves. Ms. Martin expresses that she is more concerned about how hard things have been on her than on Jayden and Angel.

<table>
<thead>
<tr>
<th>Step 5</th>
<th>Agenda/Idea Catcher</th>
<th>Participant Guide</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do:</td>
<td>Conclude this section by asking participants to take five minutes to reflect upon the materials and highlight any areas they might want to note for improvement.</td>
<td>Pages 2-3: Agenda/Idea Catcher (revisited)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct them to Participant Guide, Pages 2-3 to capture key learning points from this section of the training.</td>
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<tr>
<td></td>
<td>Ask participants to share what they wrote.</td>
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</table>
Section V: Skill Building

Estimated Length of Time:
1 hour, 5 minutes

Related Learning Objectives:
✓ Use the Basic Writing Skills Resource Guide to proof, improve, and correct a paragraph from a case note

Learning/Performance Objectives:
✓ Given an assigned case note topic area, create part of a case note using the Basic Writing Skills Resource Guide
✓ Given an assigned writing topic, proof read and edit part of a written case note using the Basic Writing Skills Resource Guide

Method of Presentation:
Video, individual work, peer review

Materials Needed:
✓ DVD: Emilio (8 minutes, 25 seconds)
✓ DVD/VHS Player
✓ External Speakers for Laptop
✓ Flip Chart Pads
✓ Flip Chart Stands
✓ Laptop
✓ LCD Projector/Screen
✓ Markers
✓ Masking Tape/Poster Putty
✓ TV
✓ Handout #2: Basic Writing Skills Resource Guide (revisited)
✓ Participant Guide Pages 2-3: Agenda/Idea Catcher (revisited)
✓ Participant Guide Page 18: Emilio Video Activity Notes
✓ PowerPoint Presentation:
  o Slide #29: Emilio Video Activity
  o Slide #30: Emilio Video Activity (continued)
## Section V: Skill Building

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Materials</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td><strong>Timelines and the Importance of Note Taking</strong>&lt;br&gt;<strong>Ask:</strong> How soon after contact with a client do you write the dictation?&lt;br&gt;&lt;br&gt;<strong>Do:</strong> Review good practice standards – It is important to write dictation within 3-5 days after contact with a client.&lt;br&gt;&lt;br&gt;<strong>Ask:</strong> Do you believe you could write the same narrative four days after a half hour home visit as you could that same day?&lt;br&gt;&lt;br&gt;<strong>Do:</strong> Suggest to the group that the only way to write good case narrative, days after the client contact, is to have extensive, detailed, and sequential notes from the contact.</td>
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</table>

| **Step 2** | **Emilio**<br>**Do:**<br>• Display **PowerPoint Slides #29-30 (Emilio Video Activity)**.<br>• See activity instructions below and run activity. | **Emilio Video**<br>Flipchart paper<br>Handout #2: Basic Writing Skills Resource Guide (revisited)<br>Participant Guide: Page 18: Emilio Video Activity Notes | 45 |

### Instructions for the Trainer: Section V, Step 2: Emilio Video Activity

<table>
<thead>
<tr>
<th>Type of Activity/Purpose</th>
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<tbody>
<tr>
<td>Gallery Walk/Carousel Stroll</td>
<td>A gallery walk provides a way for small groups to interact with each other. All groups are exposed to and benefit from the work of every group.</td>
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</table>

<table>
<thead>
<tr>
<th>Set-up and Alternatives</th>
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<tbody>
<tr>
<td>This activity uses the <strong>Emilio Video</strong> (8 minutes, 25 seconds), Handout #2: Basic Writing Skills Resource Guide, Participant Guide, Page 18, and flipchart paper.</td>
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<tr>
<th>Facilitation Tasks</th>
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<tbody>
<tr>
<td>Do:&lt;br&gt;• Divide participants into six groups. Assign each group a specific area of relevant documentation, and instruct participants to take notes on that specific area while watching the <strong>Emilio Video</strong>. Notes can be taken in the <strong>PG, pg. 18 (Emilio Video Activity Notes)</strong>. Also direct participants to <strong>PG, pg. 19-22 (The Six Domains)</strong> in case participants would like a refresher of the six domains.&lt;br&gt;  o Six Safety Domains: (see Trainer Resource on Six Domains)&lt;br&gt;    ▪ <strong>Type of Maltreatment:</strong> What is the extent of maltreatment?&lt;br&gt;    ▪ <strong>Nature of Maltreatment:</strong> What circumstances surround the</td>
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</tbody>
</table>
Section V: Skill Building

maltreatment?

- **Adult Functioning:** How do the adults within the household function, including substance use and behavioral health?
- **Child Functioning:** How does the child(ren) function, including their condition?
- **General Parenting:** How do caregivers generally parent (i.e. knowledge, skills, protectiveness, history)
- **Parenting Discipline:** How do caregivers discipline the children?

- Play the *Emilio Video* (8 minutes, 25 seconds).
- After viewing the video, give each group a piece of flipchart paper. Ask each group to create a piece of the case record focusing on their given area using what they have learned in today’s training. Direct participants to the **Handout #2: Basic Writing Skills Resource Guide** for help with and review of different areas of writing. Ask each group to write their completed piece of the case record on to the flipchart paper and to hang up the flipchart paper.
- Next assign each group a different writing topic from today’s training.
  - Relevance/thoroughness
  - Grammar/language
  - Sequencing
  - Fact vs. Opinion
  - Avoiding too much information
  - Avoiding too little information
- Ask groups to return to their piece of the case record. Using a different color marker per small group, ask each small group to review the completed case record with a focus on their assigned writing topic. Encourage the groups to mark changes or suggestions on the flipchart paper.
- Give the groups 3-5 minutes, then instruct them to move clockwise to the next hanging flipchart paper and evaluate that case record with a focus on their assigned writing topic, marking their flipchart paper similar to before. Continue this until all groups have reviewed each of the hanging flipchart papers.

**Debrief**

**Do:** When finished, give small groups 3-5 minutes to review their feedback from the other groups.

**Ask:** Does anyone have any questions or their peers’ feedback?

**Additional Notes**

N/A

**Trainer Resource: Section V, Step 2: Six Domains**

While watching the Emilio video, we are asking participants to initially take notes on areas of relevant documentation. To align this more with case notes, the areas of relevant documentation are the six domains. The six domains should be common knowledge for child welfare professionals. If you are not familiar with the six domains, below is a brief breakdown of each of the six domains.

- **Type of Maltreatment**
  This is a straightforward information element concerned with facts and evidence, which support the presence of maltreatment, which comes from worker observation, interviews and corroboration. This includes making a conclusion (substantiation) about the type of maltreatment (sexual abuse, lack of supervision, etc.) and the specific symptoms and facts (injuries/constant hitting) which are consistent with the maltreatment.

  1. What is the extent of the maltreatment?

This question is concerned with the maltreating behavior and the immediate physical effects on a child.
Section V: Skill Building

It considers what is occurring or has occurred and the results. The answer to this question results in a determination that maltreatment has or has not occurred. This includes decisions regarding allegations of suspected child abuse and allegations regarding the need for general protective services as defined in the Child Protective Services Law (23 Pa. C.S., Chapter 63) and the Protective Services Regulations (55 PA Code, Chapter 3490). However, relying only on information from this question is inadequate for assessing safety.

Information that answers this question includes:
- Type of maltreatment
- Severity of the maltreatment
- History of the maltreatment
- Description of specific events
- Description of emotional and physical symptoms
- Identification of the child and maltreating caregiver

### Nature of Maltreatment
This qualifies the maltreatment by placing it in a context or situation that 1) precedes or leads up to the maltreatment or 2) exists while the maltreatment is occurring. By selectively “assessing” this element separate from the actual maltreatment, we achieve greater understanding of how serious the maltreatment is. In other words, the circumstances that accompany the maltreatment are important and are significant in them and qualify how serious the maltreatment is.

2. What circumstances surround the maltreatment?

This question is concerned with the nature of what accompanies or surrounds the maltreatment. It addresses what is going on at the time that the maltreatment occurs or has occurred.

Information that answers this question includes:
- The duration of the maltreatment
- Caregiver intent concerning the maltreatment
- Caregiver explanation for the maltreatment and family conditions
- Caregiver acknowledgement and attitude about the maltreatment
- Other problems occurring in association with the maltreatment

### Adult Functioning
This information element has strictly to do with how adults (the caregivers) in a family are functioning personally and presently in their everyday lives. It is concerned with life management, social relationships, meeting needs, problem-solving. Among the things you would be concerned about in gathering information and assessing are behavior, communication, ability to relate to others, cognitive functioning, intellect, self-control, problem solving, coping, impulsiveness and stress management. It also includes adult mental health and substance use. It is concerned with whether role performance is influenced by mental health or substance abuse. It includes perception, rationality, self-control, reality testing, stability, self-awareness, self-esteem, self-acceptance and coherence. Remember it is important that recent (adult related) history is captured here such as employment experiences, criminal history, previous relationships and so on.

3. How do the adults within the household function, including substance use and behavioral health?

This question is concerned with how the adults/caregivers in the family feel, think, and act on a daily basis. The question focuses on adult functioning separate from parenting. It is concerned with how the adults in the household function, regardless of whether they are parents or not.

Information that answers this question includes:
- Communication and social skills
Section V: Skill Building

- Coping and stress management
- Self-control and rationality
- Judgment, problem solving and decision making
- Independence
- Home and financial management
- Employment
- Community involvement
- Self-care and self-preservation
- Substance use
- Physical and behavioral health and capacity
- Functioning within cultural norms

• Child Functioning
  This information element is qualified by the age of the child. Functioning is considered with respect to age appropriateness. Age appropriateness is applied against the “normalcy” standard. So, it is critical that you have a working understanding of child development given that you will be considering how a child is functioning in respect to what is expected given the child's age. Among the areas you will consider in information collecting and “assessing” are trust, sociability, self-awareness and acceptance, verbal skills/communication, independence, assertiveness, motor skills, intellect and mental performance, self-control, emotion, play and work, behavior patterns, mood changes, eating and sleeping habits and sexual behavior. Additionally, you consider the child's physical capabilities including vulnerability and ability to make needs known.

4. How do the children function, including their condition?

This question is concerned with a child’s general behavior, emotions, temperament, and physical capacity. It addresses how a child is from day to day rather than focusing on points in time.

Information that answers this question includes:
- Capacity for attachment
- General mood and temperament
- Intellectual functioning
- Communication and social skills
- Expression of emotions/feelings
- Behavior
- Peer relations
- School performance
- Independence
- Motor skills
- Physical and behavioral health
- Functioning within cultural norms

• General Parenting
  When considering this information element, it is important to keep distinctively centered on the overall parenting that is occurring and not allow any maltreatment incident or discipline to shade your study. Among the issues for consideration within this element are: parenting styles and the origin of the style, basic care, affection, communication, expectations for children, sensitivity to an individual child, knowledge and expectations related to child development and parenting, reasons for having children, viewpoint toward children, examples of parenting behavior and parenting experiences.

5. How do caregivers generally parent?

This question explores the general nature and approach to parenting which forms the basis for understanding caregiver-child interaction.
Information that answers this question includes:

- Reasons for being a caregiver
- Satisfaction in being a caregiver
- Caregiver knowledge and skill in parenting and child development
- Caregiver expectations and empathy for a child
- Decision making in parenting practices
- Parenting style
- History of parenting behavior
- Protective nature
- Caregiver assures appropriate supervision in his/her absence
- Whether another adult is undermining parental authority

**Parenting Discipline**

This is another information element that focuses information collection into one area – discipline of children. Study here would include the parent's methods, the source of those methods, purpose or reasons for, attitudes about, context of, expectations of discipline, understanding, relationship to child and child behavior, meaning of discipline.

6. How do the caregivers discipline the children?

This question is concerned with the manner in which caregivers approach discipline and child guidance. This question is broken out from general parenting because this aspect of family life is highly related to both safety threats and risk of maltreatment.

Information that answers this question includes:

- Disciplinary methods
- Concept and purpose of discipline
- Context in which discipline occurs
- Cultural practices

<table>
<thead>
<tr>
<th>Step 3</th>
<th>Case Documentation Improvements</th>
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<tbody>
<tr>
<td>Ask:</td>
<td>Thinking back to the activity you just completed, did anyone note any improvements in their documentation since the beginning of the training?</td>
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<tr>
<td></td>
<td>What were some areas of improvement you now see in your own work?</td>
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<td></td>
<td>What did someone else correct that should not have been corrected? Anything?</td>
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<tr>
<td></td>
<td>How did it feel to know that someone else was reading your work?</td>
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<td></td>
<td>Did you try to write better knowing it was going to be reviewed?</td>
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<td></td>
<td>Would it be helpful to you as a caseworker to consider that your work always has the potential to be reviewed?</td>
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## Section V: Skill Building

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<tbody>
<tr>
<td>Do:</td>
<td>Conclude this section by asking participants to take five minutes to reflect upon the materials and highlight any areas they might want to note for improvement.</td>
<td>5</td>
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<tr>
<td></td>
<td>Direct them to <strong>Participant Guide, Pages 2-3</strong> to capture key learning points from this section of the training.</td>
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<td>Ask participants to share what they wrote.</td>
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315: Writing Skills for Case Documentation

Section VI: Review and Evaluations

Estimated Length of Time:
20 minutes

Related Learning Objective:
✓ Explain the importance of clear written communication and related at least one personal objective for the course

Learning/Performance Objectives:
✓ Identify and cite three writing skills for case documentation gleaned from the course

Method of Presentation:
Large group discussion

Materials Needed:
✓ Flip Chart Pads
✓ Flip Chart Stands
✓ Idea Catchers
✓ Laptop
✓ LCD Projector/Screen
✓ Markers
✓ Masking Tape/Poster Putty
✓ Participant Guide Pages 2-3: Agenda/Idea Catcher (revisited)
✓ Participant Guide Page 19: Action Plan
✓ Participant Guide Pages 20-22: References
✓ PowerPoint Presentation
  o Slide #31: Advice for New Case Workers
  o Slide #32: Questions? Comments?
## Section VI: Review and Evaluations

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Instructor</th>
<th>Materials</th>
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<tbody>
<tr>
<td>Slide 31</td>
<td>Ask: Using your Idea Catchers as a guide, imagine that you are talking to a new caseworker who is asking for tips on how to write a thorough and relevant case record? Do: Ask participants to identify and record on <em>Participant Guide, Page 19</em> three key pieces of information they learned from today’s session that they might relay to a new caseworker who is struggling with writing their case records. Ask for volunteers to share one or more of their pointers with the larger group.</td>
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<tr>
<td>Display PPT</td>
<td>Do: Refer participants to <em>Participant Guide, Pages 20-22</em>. Tell participants that these are the references used to write this curriculum. Encourage them to review these references at their own convenience. Distribute course evaluations and ask participants to complete them. Thank them for participating in the training.</td>
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