

Effective Documentation

Proficient documentation is essential to support a supervisor or colleague's ability to assure a child's safety, well-being, and permanence, or testify in court when the author of the case note is not available. Every case note should be written as if it might be read by an attorney, judge, or state or federal reviewer, because such a review could occur.

Competent documentation must be objective, accurate, clear, descriptive, relevant, and concise and review the definition of each principal.

- **Objective** information means that the statements are just and reasonable and without expressing bias or prejudice.
 - Case records should concisely record what the worker sees, hears, and experiences while working with a family. They should document facts and clear behavioral descriptions.
 - Example: "The house was dirty" vs. "There was food and clutter all over the floor, un-rinsed, dirty dishes piled in the sink and sitting on the table, and the trash was overflowing from the garbage can and creating a noxious odor."

- **Accurate** information means that the statements are precise and truthful.
 - Although errors can and do occur, the author should always strive to check facts, spelling of names, and terms and grammar when documenting the case file.
 - If the worker learns that information is incorrect, add updated accurate information to the case record. **NEVER** erase original information.

- **Clear** information means the reader, a reasonable person, will comprehend the author's meaning without having to interpret the meaning of any particular jargon or ambiguous phrasing.
 - For example instead of stating: "Derek was acting out," use language that describes the specific behaviors, actions or statements of the person, such as: "Derek skipped school and was caught shoplifting."

- **Descriptive** information means that the reader will glean a detailed understanding of the events that occurred.
 - Record the date of contact, who was seen, the purpose, and the outcomes in a list or chart.
 - It is easier to understand the sequence of contacts and the important outcomes of the visit than if they are buried in a paragraph of description.

- **Relevant** information means providing pertinent, important, and significant information that relates directly to the child's safety, well-being, and permanency and the families functioning and protective capacities.
 - Avoid extensive, unnecessary, run-on information.
 - Use quotations to paint a vivid, concise picture of the family. Example: "Mrs. Jacobs seems very depressed," vs. "Mrs. Jacobs said, "Of course I'm depressed. Wouldn't you be if you were in my situation?"

- **Concise** information means that the statements are a brief summary recording of the information and not a process recording.
 - Summary recording is a concise summarized description of important facts and events in the case that enables the reader to quickly discern family's needs, services provided, and outcomes.
 - Process recording is the attempt to capture word for word or action by action what occurred during the contact. This "running record" style is often wordy, redundant and confusing, and does not get to important information quickly.