

DOCUMENTATION TRAINING

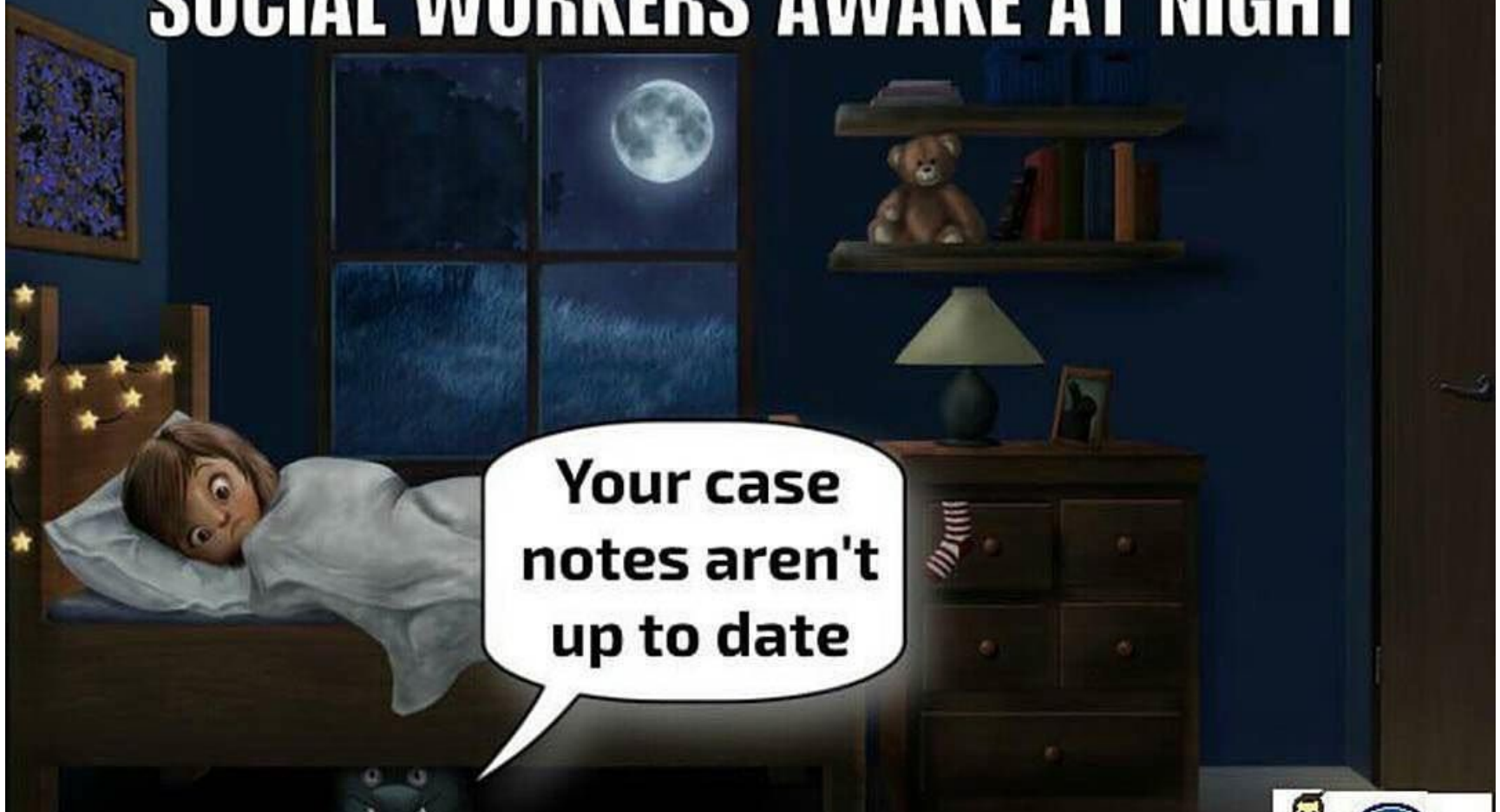
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LEARNING OBJECTIVES

- To learn the purpose of documentation
- To learn the difference between subjective and objective documentation
- To learn essential elements of documentation
- To learn helpful tips for completing documentation

THE MONSTER UNDER THE BED THAT KEEPS SOCIAL WORKERS AWAKE AT NIGHT



**Your case
notes aren't
up to date**



PURPOSE OF DOCUMENTATION

Provides a history of case activity for the future

Documents how a resident has responded in the past to agency intervention

Documents decision making

Measures resident progress

Means of communication to future service providers

PURPOSE OF DOCUMENTATION

Supports worker in the event of resident challenges

Provides means of supervision

Allows worker to look for patterns

Provides information in the absence of a worker

Evidence in court testimony if subpoenaed

Risk management

WHO WILL READ YOUR DOCUMENTATION?

- Documentation will be read and interpreted by other individuals and must be clear and accurate.
- The best strategy is to assume the reader is a stranger who will not have the opportunity to ask follow-up questions.
- Never write anything that you wouldn't want read in court!

OBJECTIVE LANGUAGE

- Observable-able to be seen, heard or touched
- Reports facts
- Able to be counted
- Would be the same from multiple reporters

SUBJECTIVE LANGUAGE

- Opinions
- Judgment
- Assumption
- Belief
- Varies from person to person
- Perception
- Your interpretation

OBJECTIVE VS. SUBJECTIVE ACTIVITY

- Determine which words or statements are Objective/Subjective?



**OBJECTIVE
OR
SUBJECTIVE?**

Navigator met with resident to review Care Plan.

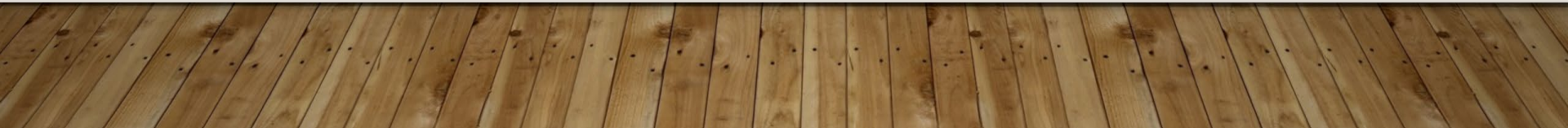
Resident was depressed.

Resident stated that she is feeling overwhelmed.

Staff observed resident working on the computer.

Resident does not have any motivation to change.

Resident was tearful.



OBJECTIVE OR SUBJECTIVE

Staff smelled alcohol on resident.

Resident was high.

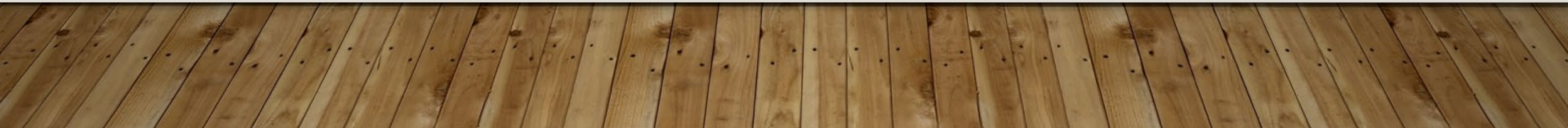
Resident had 3 large bags with him.

Resident thinks working with service providers is a waste of time.

Resident stated “I don’t know what to do to get a bed at one of the shelters.”

Resident wanted to make me mad.

This client is a mess!



GROUP ACTIVITY

- <https://www.youtube.com/watch?v=0Kvw2BPKjz0>
- What challenges did you face if you could only hear what was going on?
- What does this activity tell you about varying perceptions and view points?

DOCUMENTATION TIPS

- Be clear and concise yet comprehensive
- Note who was present at the session
- Proofread your documentation
- Avoid using slang terms, abbreviations and CoC jargon
- If you are completing what the client says, put it in quotations
- If you're paraphrasing, summarize the statement
- Ask your supervisor how they would like you identify yourself in the case record (ex., by title)

DOCUMENTATION TIPS

- Purge notes from file (post it notes, etc.)
- How long did you meet with the client? Where did you meet?
- How to correct errors if handwriting documentation
- Only document information relevant to service provision
- Document attempted contacts
- Document contacts with other service providers
- Block off time to devote to documentation-find a system that works for you!

**WHEN YOU NEED TO WRITE
DETAILED CASE NOTES**

**BUT CAN'T KEEP UP
WITH YOUR CLIENT**

FORMAT FOR DOCUMENTATION

- ALWAYS follow the policy of your agency on format for notes
- SOAP
 - **S**atement about relevant client behavior
 - **O**bservable statements
 - **A**ssessment
 - **P**lanning/Plans for client

EXAMPLE

HV - CM met with ct in her home. Cts unit is clean and tidy. CM walked through all three bedrooms and there are no work orders needed at this time. Cts utilities are working and ct reports having "no issues right now other than allergies". Ct states she has been looking for work but indicated she "lost the car" because she could no longer make the payments so she is limited to working near her home or taking the bus. Ct says she is "still applying" but says it feels like "no one is hiring right now". CM encouraged ct to keep trying and suggested she use a temp agency or the Texas Workforce Commission. Ct says she is "more likely to do that when the kids start school". Ct informed CM that her children start school August 7th and asked when she would get the uniforms and school supplies. CM stated she was unsure of the timeline and indicated she would keep ct informed once she knew more.

EXAMPLE

After supper club left G10 came to LSES stating H5 was around barrier in dining room when G10 came to help supper club clean up G10 told H5 that he cannot be over there H5 then looked at supper club and said G10 doesn't want me back there because I have HIV G10 said no the reason is for health reason we are not allowed back there. H5 then began to stare down G10 and tried to intimidate her. H5 was staring at me and was trying to make me mad and the way he was acting I think he was on something. G10 said I'm not going to argue with you and H5 left.



SUPERVISOR

"Finish your notes!"

@therapynotesllc



"What did he say??"

"I don't know, something about petting goats"

QUESTIONS?

-Remember the saying-if you didn't document it, it didn't happen!