

## Case Notes: What to Write; How to Write; and What to Avoid? (Presentation by Bruce Benson, M.S.Ed. @ Seta Conference)

### Why are case records important?

- **Assessment summary**
  - a. Capture relevant data elements!
  - b. Present accurate customer "snap shot"!
  - c. Deficiencies and barriers should link directly to services and activities!
  
- **Case management Guide**
  - a. Sequential tracking and reporting of customer contact and progress!
  - b. Capture newly emerging barriers!
  - c. Revise action plan!
  
- **Accountability**
  - a. WIA axiom = "If it ain't in writing, it never happened!"
  - b. Internal oversight!
  - c. Monitoring and auditing!
  
- **Professional and ethical responsibility**
  - a. Human services and helping professions identify record keeping as an important ethical requirement!
  
- **Information Sharing**
  - a. "In-house" sharing of important data and action plans critical to successful customer service!
  - b. "External" sharing is critical to optimizing referral relationships with outside partner agencies!

## How to Write Case Notes

### **Write Case Notes that are:**

- Clear and brief
- Concise, precise
- Accurate and complete
- Timely
- Readable - acceptable grammar

### **What you should avoid:**

- Avoid "diagnoses"
- Avoid "Clichés"
- Avoid "street talk"
- Avoid Jargon
- Avoid Stereotypes and prejudices

### **Case Notes should:**

- Describe behaviors reported by customer and collateral contact!
- Record statements made by customer!
- Record your observations!
- Substantiate conclusions and judgments!
- Link services to documented deficiencies!

### **Strong verbs to use...**

- |              |             |
|--------------|-------------|
| • Advised    | Focused     |
| • Assessed   | Identified  |
| • Assisted   | Recommended |
| • Clarified  | Referred    |
| • Confronted | Reflected   |
| • Counseled  | Structure   |
| • Discussed  | Summarized  |
| • Directed   | Supported   |
| • Encouraged | Urged       |

## How to Write Case Notes

### Words to avoid...

- Abnormal
- Abusive
- Anxious
- Dangerous
- Delusional
- Demanding
- Disturbed
- Hysterical
- Immature
- Impulsive
- Irrational
- Overwhelmed
- Resistant
- Suicidal
- Threatened
- Troubled
- Uncooperative
- Unfit

### Considerations...

- Federal Privacy Act of 1974
- Family Educational Rights and Privacy Act of 1974
- Ethical Guidelines and practices
- **Privacy** - "The right of persons to choose what others may know about them and under what circumstances. The central notion is the freedom to determine the disposition of personal information." (Stadler in Herlihy and Golden, 1990)
- **Confidentiality** - "The right to privacy in general contexts is otherwise known as confidentiality in the context of professional relationships. Confidentiality highlights a professional ethical responsibility to respect the client's right to control personal information and access to it." Stadler in Herlihy and Golden, 1990)