



Best Practices for Case Notes

Purpose: The purpose of case notes and documentation is to record interactions and coordination of services on behalf of NAZ families. Case notes provide a summary of conversations, present circumstances, reflections and actions. Case notes also track the individual and family's progress, services provided and interactions between coach and family.

Remember: Case notes are not just for you. If a supervisor, auditor, or another authorized individual looks at the profile they need to be able to get a clear picture of who the family is, what they are working on, what areas need attention, etc. *Case notes should provide a good narrative with enough detail to help current, back-up and future members of the Family Achievement team. Good case notes require discipline. Case notes also keep us accountable to the work we do.*

Case Notes should include the following:

- Notes should be clear, concise and objective
- Include discussion details related to: goals, action steps, timelines, strengths and barriers
- Notes should be inclusive of all needed information and be written in a manner as if the individual/family will read it
- Limit the use of acronyms as the person reading your notes may not understand all abbreviations
- Use complete sentences when writing notes
- Use tags to highlight all topics discussed
- Avoid bias by leaving out opinions and /or assumptions
- All successful interactions (calls, texts, emails, face to face visits) should be documented
- All attempts should be documented including 'no shows'
- Ideally case note completion in NAZ Link would happen immediately following visit/call/interaction with individual/family, however, sometimes this is not possible. It is critical that you get in the habit of jotting down a few notes during every interaction

so you do not forget pertinent information. Case notes **MUST** be completed by the end of each week.

Case notes should NOT include:

- Sensitive information such as mental and or physical health diagnosis, family violence information, etc.
- Avoid subjective and judgemental statements

How to document progress note:

DAP Template.

D - data

A - assessment

P - plan

Data: brief description of what family/individual shared/reported. Specific factual information.

Assessment: How does conservation relate to overall goals. If new goals are determined, document new goals. Assessment can also include barriers/challenges and possible solutions to these barriers. Identifying needs.

Plan: Action plan. How to achieve above stated goals. What needs to happen before the next achievement planning meeting. Referrals needed and or provided. Be sure to include the responsible party next to each action item.

Great case notes come from telling the whole story, sharing the facts, and knowing that anyone can pick up where you left off.