



315-1
Writing Skills For Case Documentation

A Training Outline

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Pennsylvania Child Welfare
Training Program

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315: Writing Skills for Case Documentation

Agenda for a Full-Day Curriculum on Writing Skills for Case Documentation

Content Title	Estimated Time	Page
I. Introduction and warm up exercise	30 minutes	
II. Value of good case record/documentation	60 minutes	
III. Basic Writing Skills	45 minutes	
IV. Advanced Writing Skills	60 minutes	
V. Written Components of Case Records	60 minutes	
VI. Specialized Sections Within Case Records	30 minutes	
VII. Skill Building	60 minutes	
VIII. Review	15 minutes	

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An Overview of the Curriculum

Rationale:

Case documentation is often the aspect of the job that child welfare professionals like to do the least. Despite this fact, how these professionals document the work that they do often becomes the most important aspect of their job, and may become a key factor in the life of a child. At a minimum, case documentation measures client progress, assures services to children, provides information for the future, provides means of supervision, serves as a guide in the absence of the worker, functions as a legal document in court testimony, and documents how decisions are made. As workers are often pressed for time in all that they do, being able to complete clear, concise, and accurate documentation of all contacts regarding a case is an essential component of a child welfare professional's job.

Competency:

315-1 The worker can identify pertinent data for inclusion in case records and report, knows how to organize information in a clear, concise manner, and is able to record summarized case assessments, case plans, and other supporting data into the family case record and reports.

Learning Objectives:

- 1) The participant will demonstrate awareness of the value of good case documentation.
- 2) The participant will demonstrate the ability to have proper spelling, grammar, sentence, and paragraph structure.
- 3) The participant will use social work terminology appropriately and consistently throughout case documentation.
- 4) The participant will be able to identify what information needs to be documented in case records.
- 5) The participant will be able to differentiate between pertinent detail and verbosity.
- 6) The participant will recognize documentation needs for specialized case record sections.
- 7) The participant will demonstrate the ability to record information in a clear, concise, and efficient way.
- 8) The participant will recognize how their own cultural background may affect their case documentation.

Length of Workshop:

6 hours

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An Overview of the Curriculum (continued)

Materials Needed to Present Workshop:

Flip Charts
Markers
Overhead Projector
TV/VCR
Video Scenarios-CYF Case Studies
Curriculum with Transparencies
Handouts for participants
Writing paper-tablets

Target Audience:

Child Welfare Caseworkers and Supervisors

Expectations of the Trainer

Trainer should be experienced in completing case narratives and summaries. Trainer should also have clear understanding of the use and purpose of a child welfare professional's case record, as well as the specialized sections within the record. Trainer should have an understanding of the value of the record as well as the time constraints workers face in completing their paperwork.

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I. Introduction

Learning objective: Introduce trainer and training including competency, learning Objectives and rules. Prepare participants for training day.

Method of presentation: Lecture, individual introduction.

Time: 30 minutes

Materials needed: Quotes on walls

Flip chart with daily time scheduled

Handout 1: Competency and Learning Objectives

Handout 2: Agenda

Handout 3: Bright ideas...

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Introduction

Outline of presentation: Trainer will introduce self and logistics of room and time schedule for the day (9:00 start, 10:30 break, 12:00 lunch, 1:00 return, 2:30 break, 4:00 finish). Trainer will then introduce the competency, learning objectives, and specific agenda. Participants will then be given a handout for note taking and complete an “ice breaker” activity.

Step 1:

Trainer introduces self, rules, logistics, and schedule (9-4). Trainer should remind participants to feel free to ask questions, be nosy, and take care of themselves so that they get the most out of their training day.

Step 2: Trainer introduces Competency and Learning Objectives to the group. Distribute **Handout #1 Competency and Learning Objectives**.

Trainer note: trainer should highlight the concept that today is not a legal training in terms of specifics of inclusion in a case record. Trainer will be aware of the basic format of a case record, but is not here to tell participants time frames for forms, or who receives what letters as per regulation. Also, trainer should mention PACWIS is coming into effect and may impact the format of what we write, but not the content of what we write.

Step 3:

Refer to **Handout #2, Agenda** and walk participants through the day’s schedule

Now would be an appropriate time to inform the trainees that today is a workday. The only way to improve a skill is to study it, practice it, receive feedback, and practice it again. Today they will be doing a fair amount of writing for the purpose of learning and improving a needed and useful job skill.

Point out to participants the following quote hanging on the wall: “For the things we have to learn before we can do them, we learn by doing them” Aristotle. **Trainer note: find collection of quotes in Appendix #1.** Acknowledge the strengths in the room as this training is for workers who have completed their CORE training and are now working in the field. Recognize that most likely, they have been doing dictation and case documentation for some time without ever having anyone work with them to improve this important skill.

Step 4:

Trainer should point out that around the room are quotes hanging on the walls. Trainer should instruct trainees to choose a quote that is pertinent or meaningful to them either professionally or personally and take it to their seat. Ask each trainee to give their name and their county and to read their quote. They should then briefly offer why the quote is meaningful to them. **Trainer note: the training program will supply copies of quotes.**

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Introduction (continued)

Trainer should then make the point that much like these quotes on the wall, the things people say or write sometimes have a way of sticking around for a while. Things caseworkers write in case notes or forms stick with them forever and cannot be changed, rewritten or taken back. In general, we never know who is going to be reading our case notes in the future and they need to be written clearly, concisely, and accurately, so that whomever is reading them, knows exactly what the writer was trying to say. That is the purpose of today's training.

Step 5: Introduce "Bright ideas", **handout #3**. Recognize that the trainees all come from different places and the trainer cannot expect everyone to absorb all of the same main points. For that reason, trainer suggests that the participant take notes however they are comfortable, but when something really strikes them, to place that note on their "bright ideas" handout. This handout will then be something available to keep next to trainee's workstation for easy reference.

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Section II. Value of good documentation/case record

Learning objective: Participant will demonstrate awareness of the value of good case Documentation.

Method of presentation: Large group discussion, lecture, video, and individual work.

Time: 60 minutes

Materials needed: Child Protective Investigators Procedures Training video
Derrick Johnson segment
Flip chart

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Section II. Value of Good Case Documentation/Record

Outline of presentation: Trainer will establish that working on written documentation is often the least favorite part of the job, yet in the eyes of many, one of the most essential. By using a large group discussion, Trainer will establish what trainees like or dislike about doing documentation work. Trainer will then brainstorm with the group what are the functions of case records. By reviewing the functions of a case record, the trainer will have the opportunity to connect for trainees why this aspect of the job is so crucial. By establishing the value of the work, the trainer will help trainees give case documentation its proper place on the trainee's list of priorities.

Trainer will then present video to trainees and ask them to complete a narrative like they would on the job. This exercise is meant to give trainees something to work off of for the duration of the day and is not a lesson unto itself.

Step 1:

Trainer should ask each trainee to list for themselves the three things they like best about their job and the three things they like least about their job. Give them 5 minutes and tell them to really give it some thought.

Step 2:

Using two separate flip charts collect from the group separate lists of what do they like best and least about their jobs.

Trainer's note: it is usually helpful to ask a volunteer to come to the front and write as suggestions are thrown out. This frees the trainer to run the discussion and call on trainees for answers without turning their back to the group. This technique can be used for all large group discussions that involve writing lists on a flip chart.

The list of things trainees like least should include such items as: paper work, 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.

Paperwork and other case documentation activities (risk assessment, service plans...) will surely end up on the flipchart of things trainees like least about their jobs, and not on the list of things they like best. Be prepared for some individuals to say that they like that part of the job and ask the group if anyone disagrees that they are in the minority.

Step 3:

Ask, "why is completing the case documentation such a chore?" Most likely people will say it's the lack of time or the nature of the work (solitary or boring). If trainees wanted to do paperwork, they most likely wouldn't have gone into social work. Acknowledge that many social workers may not have chosen the field if they knew about the emphasis that Social Work now places on paperwork and documentation.

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Section II. Value of Good Case Documentation/Record (continued)

Look at list of things trainees like best about the job. Generally, client contacts, helping people, and working with the public will be the type of activities mentioned. Recognize that “paperwork” probably is on very few if any lists in the room for activities that the trainees like best about their jobs.

Tell the group that we called this training “writing skills for case documentation” because if we called it “doing your paperwork” no one would come.

Step 4:

Ask the group: how are they currently going about completing case documentation? This should spur discussion as everyone likes to complain about paperwork. Are any of them doing it at home? In their car? Dictating? Ask how many of them are up to date on your paperwork. Ask how many of them feel that they have too much documentation work to do and it keeps them from having time to do valuable and needed client contacts?

Step 5

Try to put all of what was just discussed altogether. Acknowledge that case documentation is something that child welfare workers generally don’t like to do, that it is not easy to do, and that with limited time for all that they have to do, it often falls to the wayside as a low priority.

Step 6:

Ask the group, since we know we don’t like to do it, we know its not easy to do, and we know it takes us away from client contact and the real work of the job, why is it such a priority for management within our agencies?

Follow that question up by asking- what are the functions of a case record?

Through large group discussion, develop as complete of a list as possible. Record answers on flip chart for hanging in the training room. When complete, the list should include at least the following:

- Provides a history of case activity for the future
- Documents how a family has responded in past to agency intervention
- Documents decision making
- Measures 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

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Section II. Value of Good Case Documentation/Record (continued)

- Allows worker to look for patterns
- Provides information in the absence of a worker

After every answer, trainer can ask the group: and why is that important?

Step 7:

Trainer should then look at the list that was created and ask the group who the record is for. Who should value it the most?

The record is for the caseworker more than for the client. A worker should value their case records as their own safety plan in case problems arise. When questions arise about decisions that are made such as closing cases or providing certain services, good case documentation for those decisions is a caseworker's best friend.

Records also function as a toolbox when workers have to consider what to work on next with a family. When a worker gets a new case and previous caseworkers have done a good job with case documentation, without exaggeration, it can save a worker from repeating services or even save a life. Point out that case files are also legal documents, not to be taken lightly.

So the question shouldn't be why do we have to do all this, but why wouldn't we want to? Human nature challenges us to do the activities that are essential but not fun. Taking out the trash, changing the oil in our cars, doing laundry are all essential things that we do because we see the value in them.

Trainees should be told to see the value in their case record. They will do a better job with it and more often than not they will be glad they did.

Step 8:

The trainer should point out that specialized sections of case records will be discussed later, but that the key to good case documentation is the ongoing case dictation, or the narrative. Throughout this training, we will be referring back to trainees' own writing styles. To give trainees a frame of reference on where they need work, the trainer should tell the group that its time to begin writing.

Give direction that the group will be watching a video scenario of a CPS investigation at this time. Later, the group will be looking at other types of videos, so no one should feel like this type of scenario doesn't apply to them. Trainer will then ask trainees to watch the video and take notes as they would if they were the caseworker, and prepare to write out a narrative on the video. Ask them to please not write the narrative as the video is playing as that would defeat the purpose of the exercise and would most likely keep trainees from catching all of the detail of the scenario.

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Section II. Value of Good Case Documentation/Record (continued)

Show the video, **Child Protective Investigators Procedures Training, Derrick Johnson segment.**

Step 9

Ask the workers to complete a detailed case narrative of the video. Explain that you would like them to try to complete the narrative exactly how they would do it if they were the caseworker and were documenting client contacts. Acknowledge that it is hard to simulate that in a training session, but that it is to their benefit to try to analyze their work as they actually do it. By the end of the day, if they follow the exercise, they will see the benefits.

If time allows, ask if any volunteers would like to read their dictation aloud. This will give workers an early opportunity for comparison of their work with others'.

After workers dictation is complete, remind them that we will be referring back to their dictation during future sections.

Trainer note: it is probably time for morning break.

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Section III. Basic Writing Skills

Learning objectives:

Participant will demonstrate the ability to use proper spelling, grammar, sentence and paragraph structure within case documentation.

Participant will recognize how their own cultural background influences their writing styles and their case documentation.

Method of presentation: Lecture, large group discussion, and individual exercise.

Time: 45 minutes

Materials needed: Overhead #1 Pronouns Example #1

Overhead #2 Correct use of Pronouns-Example #1

Overhead #3 Pronouns Example #2

Overhead #4 Correct use of Pronouns-Example #2

Handout #4 Pronouns

Handout #5 Apostrophes

Handout # 6 Quotations

Handout # 7 Run on sentences

Handout #8 Use of numbers.

Resources used:

Purdue University Online Writing Lab (OWL).

<http://owl.english.purdue.edu> 226 Heavilon Hall, Purdue University.

Desk Manual: Writing for Results. Department of Public Welfare.

Castilaw, Diane. (1993) Court Reporting: Grammar and Punctuation. Cincinnati, OH South Western Publishing Company.

Callahan, Madelyn, Editor. (1993) Be a Better Writer, American Society for Training and Development, Alexandria, VA

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Section III. Basic Writing Skills

Outline of presentation:

Trainer will establish reasons for good grammar that build on previous leaning. If the case record is potentially going to be read and interpreted by so many others, shouldn't it be clear and correct?

Trainer will go through "cheat sheets" on punctuation. Trainer will point out in bibliography books that will serve as helpful to the participants. Trainer will discuss value of proper grammar, spelling, and sentence structure within case documentation and express to the participants that this training was not meant to be English 101.

Trainer will then go through certain grammatical concepts that writers should be aware of such as the use of numbers, and the confusing use of pronouns.

Trainer will then open up the floor for discussion on culture and its impact on case documentation. This refers to culture in the broadest sense of the word.

Step 1

Acknowledge the skill in the room and explain to participants that this is in no way meant to challenge their abilities or knowledge as a whole, but to give resources for those of us who do struggle with writing skills. Training will also not focus on spelling as spell check or secretarial assistance should be readily available to all of us.

Trainer should point out that as workers, we often tend to write the way that we speak. Sometimes that works and sometimes it doesn't.

When we speak we are often able to get direct feedback and be assured that the listener is getting what we are trying to say. How does that happen? When a listener nods to our speech or smiles or shows emotion, we know how they have received what we have said. We are also able to ask for feedback to assure that our message is getting across.

Often, when we write as we speak, we cannot be assured that the reader is getting what we mean. We are often not there when someone is reading our case records. Case records may not be looked at until years later than we wrote our dictation.

Therefore, it is imperative that we write in a manner that is clear to any reader with an understanding, that we may not be available to clarify any questions about how or why we wrote something, or what we meant by a particular phrase.

At this time, the trainer should introduce the areas that we will be talking about in terms of grammatical presentation and making their written work clearer: Pronouns, apostrophes, quotation marks, numbers, and organization/sequencing.

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Section III. Basic Writing Skills (continued)

Step 2

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. Again, consider a case being read a year from now in your absence. If your original intent of a “he” is lost then your whole dictation, and possibly all of your casework efforts, could be rendered meaningless.

Put **Overhead # 1 Pronouns Example #1** on the overhead. Read the narrative out loud for the group:

Lori called upset that her mother had told her that we didn't believe her regarding the incident. She stated that we felt she made up it up and now she doesn't know what to do next. She said that she feels like hurting herself over this. I stated that with her history, she shouldn't believe everything she hears.

Tell the participants that this type of writing is not unusual in case dictations where the writer knows what they are trying to say and not putting much thought into whether or not the reader is getting a clear message.

Ask the questions: Who is it that we don't believe? Who feels like hurting themselves, Lori or Lori's mother? Whose history is the writer referring to, Lori or Lori's mother? What would be a better way to write this?

Step 3

Before putting up the corrected overhead, ask the group for a better way to write what the author was trying to say. If the group has trouble, point out that is exactly the point that it is hard to understand what the author was saying.

Put up the **Overhead #2 correct use of pronouns Example #1** on the projector:

Lori stated that her mother *had told her that we didn't believe her regarding the incident.* **Mrs. Smith told Lori that** *she felt Lori made it up and now Lori doesn't know what to do next.* **Lori stated that she** *feels like hurting herself over this.* **I told Lori that knowing her mother's history, Lori shouldn't believe everything she hears from her mother.**

Ask the group if there are any questions. Express to the group that we will be discussing writing concisely during the training day, but it is most important to write clearly, then look for ways to cut out extra narration. A short, confusing narrative does no one any good.

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Section III. Basic Writing Skills (continued)

Step 4

Repeat the process with the second example using **Overhead #3 Pronouns Example #2 and Overhead #4, Correct use of Pronouns, Example #2**. When complete, pass out the handout on correct use of pronouns, **Handout #4 Using Pronouns Clearly**.

Step 5

Pass out handouts on use of Apostrophes (**Handout #5 The Apostrophe**), quotation marks (**Handout #6 Quotation Marks**), run on sentences (**Handout #7 Run-on Sentences**) and use of numbers (**Handout #8 Writing Numbers**). Explain that you would like everyone to take 5-10 minutes of time to read to themselves through the handouts. This way if anyone has any questions regarding the rules, they can be discussed before the trainer moves on.

Now have the trainees go through the dictation they completed after watching the video and have them look at how they used pronouns, apostrophes, quotes, numbers, and run on sentences. Tell trainees to fix their dictation that they completed after watching the video. Ask if any of the trainees would be willing to volunteer some of the changes they have made.

Step 6

At this time, trainer should bring up the question about how an individual's personal culture may effect their writing style. This training has been developed for workers who have at least completed the CORE training program and have had significant exposure to the concept of culturally competent practice.

The trainer should try to open discussion on the topic by covering the following line of questions.

Ask the group:

- 1) Do you agree with the concept presented earlier that people tend to write as they speak? The group will most likely agree with the trainer.
- 2) Does our individual culture affect the way we speak? How?
- 3) Putting questions one and two together, how then, is our personal culture reflected in the way we write?
- 4) In what ways could culture affect the ways in which dictation is done?
(Trainer note: now is a good time to introduce the concept of the use of slang terms in dictation, which is inappropriate, unless it is a direct quote. Readers easily misunderstand slang terms and different people consider some terms offensive.)
- 5) What potential problems do cultural differences present to case documentation? (problems understanding what the writer intends to express, possibility of insulting or alienating the reader)

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Section III. Basic Writing Skills (continued)

- 6) Do you feel that the English language is sexist (male dominated i.e. chairman...) and workers need to be aware of how they write their dictation in regard to sex? Are phrases such as “mankind” offensive to some?
- 7) Is it important how you label a person’s race within your case dictation? Why?
- 8) Is it important to show respect for people’s cultural differences in your dictation? Do you feel that is always done?

The discussion regarding culture is one that can be brought up continuously throughout the training day. This discussion can be wrapped up by reviewing the prior training concept that once it is written, a worker never knows who will be reading their dictation. Would any of the trainees want to be sitting on a stand, testifying from their case record, and feeling unsure about whether their words were offensive to anyone in that courtroom?

Step 7

Express to the group that you have already accomplished much within this section if the trainees give some thought to the structure of what they are going to write before they actually start to write. Ask the group for feedback on how they individually proceed when doing case dictation.

Most people will respond that they just start to write and let it flow. The trainer should help workers to establish a proper sequence to their writing. Discuss with workers to take notes in sequence, writing down things as they occur, during a client contact, is the best way for them to organize in preparation for writing. By having properly sequenced notes, a worker can properly sequence their dictation. If a worker is unable to take notes during an interview, phone conversation, or a visit, that worker should take the time immediately after the contact to outline the sequence of events that happened during the contact. That will allow the worker the opportunity to complete better, more accurate, and clearly understandable dictation. At this time, trainer could ask the group why having properly sequenced dictation is important.

Step 8

To illustrate the above point, as a large group, review the sequencing of the important aspects of the Derrick Johnson video. Did all participants have their dictation sequenced out the same way? If not, how could that effect their investigation? Did they include the interview with Cherise in their dictation? Why or why not?

Trainer note: For the purpose of your discussion, use the following order of events for the sequencing discussion of the Derrick Johnson video.

Interview with Derrick alone and outside.

Derrick talked about his problems with older boys “they hit hard.”

Derrick stated his father beats him because he deserves it.

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Section III. Basic Writing Skills (continued)

**Derrick showed injuries to arm, leg, and shoulder.
Derrick talked about being a sinner and having to read scripture.**

Interview with Charise.

Charise reports that she sees Derrick get hit.

Charise stated “daddy keeps us from getting into trouble.”

Charise stated that getting “whipped” on the behind is always “best.”

Interview with Terrence and Gloria Johnson in home

Mr. Johnson admitted to hitting Derrick with his belt.

Mr. Johnson stated he was his own boss and talked about his business.

Mr. Johnson talked about Derrick’s refusal to do chores.

Mr. Johnson stated that there was no need in his family for counseling.

Worker asked Mr. Johnson if Derrick was a troublemaker.

Mr. Johnson lit his pipe and questioned Mrs. Johnson if she cleaned it.

Mr. Johnson stated family most important-outside of scripture.

Mr. Johnson called in Derrick, who bristled at being touched by his father.

Complete this section by reminding trainees that the group has been discussing basic writing skills for their case dictation. Trainer should try to illicit feedback as to whether anyone in the group can already see ways to do their dictation better. Trainer should then point out that the next section goes beyond simply the structure of how to write, but is about what words we choose and what is important to write about.

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity

Learning Objectives:

Participant will be able to demonstrate the ability to differentiate between pertinent detail and verbosity.

Participant will be able to demonstrate the ability to properly use social work terminology consistently throughout case documentation

Participant will be able to record information in a clear, concise, and efficient manner.

Method of Presentation:

Child Protective Investigators Procedures Training Video, Andy Thompson segment.
Large group discussion, and small group activity.

Time: 60 minutes

Materials needed:

Child Protective Investigators Procedures Training Video, Andy Thompson segment.

Handout # 9 What to Record

Handout #10 Proper Case Documentation

Handout #11 Elements of Good Case Documentation

Overhead #5 Use of Tone

Overhead #6 Case Fact From Opinion Example #1

Overhead #7 Case Fact From Opinion Example #2

Resources used:

Case Documentation: (1994) SUNY Research Foundation/CDHS.

Desk Manual: Writing for Results. Department of Public Welfare.

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

Outline of presentation: Participants will try to build on previous learning by looking at the concepts of the words they choose to write with, not just how they place them in a sentence. Discussion will be held about what is pertinent to a case record and why. Writing styles will be discussed and examined. Social work terminology will also be discussed. Finally, the important concept of the documentation of case fact vs. worker opinion will be looked at and worked on.

The trainees will do some small group work to process some of the information they have been given and to work on small segments of case dictation to try to improve their writing.

Step 1

Open the discussion by pointing out that in a typical writing class the trainees would be taught to write, rewrite and rewrite again for the most effective way to communicate their message.

Trainer should then demonstrate that they understand the caseworker's job by expressing that they as the trainer know that caseworkers don't have the time, or usually the desire, to write, then rewrite for the best possible results.

Workers just don't have the time to put that kind of effort into their dictation. Workers are happy just to get it done once. That's why it is so important to get used to writing efficiently.

We all are limited in time. Yet, some workers write so much in their dictation that they waste their time writing it, and other's time reading it. Those workers should be commended for being careful and thorough, but need to be trained to write more clearly, concisely, and accurately.

Ask the group-How many of them are up to date on their progress notes? How many of you feel that you have too much to do to keep up? Ask how many of them enjoy doing the narrative part of the risk assessment process? How many trainees struggle with what to say in their case narratives, asking them selves what is important? Same questions for case dictation, closing and transfer summaries...

Point out that demands on caseworker's time requires that documentation be done in an economic manner. At the same time, documentation must be thorough and complete. Case documentation must also be objective, respecting the rights of clients. Offer participants support for what they have accomplished at their jobs and all that they do.

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

Step 2

Tone is an important concept that often comes across clearly in a workers case dictation. Sometimes that is good, it has the potential to be bad. Trainer should prepare a flip chart with the definition of “tone.” Tone is “a writer’s attitude toward the subject or it’s readers” (desk manual-page 9) and although it is not part of the worker’s job to promote goodwill in their writing, by appearing prejudicial, the writer clearly is putting themselves in a vulnerable position. Feelings should not be involved in case notes. For the notes to be given credibility, they must have the appearance of objectivity.

Ask the group-has anyone ever gotten angry writing case dictation and seen it in their words? What kind of words shows personal feelings?

Trainer should show the group **Overhead #5 Use of tone.**

Mrs. Smith again wasn’t home for our scheduled appointment. She shows no respect for me and I did not get any messages from her canceling the appointment. It is clear that she has no desire to work on trying to get her children home. This worker left her a note informing her that again she has wasted my time and because of that I will not be scheduling any visits for her with her children until she meets with me.

The trainer should read the statement out loud and then point out that a read of that narrative clearly gives the impression that the worker is insulted at the waste of her time and that her case decisions are being driven by that, not the best interests of the children. If you were a foster care worker working towards termination, you would not want a judge to read that in your notes.

Ask the group for suggestions of a better way to write the above note. Uncover the second part of the overhead. Ask the group if they can sense a difference in the way the second example is written. Ask the group if the second example accomplishes everything the first example does. Then ask if it accomplishes more, by demonstrating the objectivity of the worker.

Scheduled home visit with Mrs. Smith. She was not home. This is the third consecutive home visit Mrs. Smith was not home for. This worker left Mrs. Smith a note requesting a call as future visits with her children cannot be scheduled until I hear from her to confirm that she is OK and can assure her attendance at the visit. This worker needs to meet with Mrs. Smith to review progress on family service plan objectives.

The second example is not more concise, but it is a better way to express what happened within the worker’s client contact.

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

Are there any questions about the use of tone in dictation and why the appearance of objectivity is what you want your writing to reflect?

Step 3

Trainer should bring up proper use of social work terminology within case narratives. Trainer should again emphasize that when we write, we are writing so someone else can read our work and know what we are saying. Trainer should ask the group if anyone give an example of a phrase or phrases that we hear almost daily, but, that if we asked the average person on the street what they were that person would have no idea of what we were talking about?

Do you think everyone knows what SWAN is? Or the CPSL? FSP? PPP? NASW? GPS?

You may find the need to write any or all of the above abbreviations at some point during your social work life. How do you decide what to write out? A good rule is to write out any such term the first time you use it, and put the abbreviation in parenthesis. You can then use the abbreviation throughout the rest of your dictation.

While it is extremely important that you use social work terminology consistently and correctly throughout the case record, it is also important that you stay away from writing things like, "Lori has issues regarding her father that appear to upset her". What does that mean?

If you are trying to say that "Lori has feelings about something in her past that appears to make her anxious regarding her father", then say that. Try to always consider that you are writing for accuracy, conciseness, and clarity, as well as for other readers.

Step 4

At this point the trainer should try to express the importance of the next section to the group. If they take nothing else out of the training today, trainees should learn what to include and what not to include within their case records.

Ask the trainees, how they decided what is a pertinent detail when they are doing case dictation.

In discussion, the trainer should illicit from the group that with any questionable detail, the caseworker should be consider the question "what does this information have to do with the reason that I am involved with this family?"

Pass out **handout #9 "What to Record"** and go through with participants.

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

Where does the condition of a home fit in this list? Is what a client is wearing pertinent detail? How many of you recorded any detail about the home or appearance in the Derrick Johnson case? In the Derrick Johnson video, was it pertinent that Mr. Johnson was smoking a pipe? Consider this in regard to tone. (Some workers dislike it when clients smoke) What about Derrick's sister saying that girls don't need the whip like boys do? Was that significant?

We talked earlier that our writing often reflects the way we talk? Ask the group if anyone sees himself or herself as someone who likes to talk a lot? Ask them if they see that reflected in dictation that is not concise? Ask them if anyone sees himself or herself as a quiet type who prefers to listen? Do they find themselves struggling with what to put onto the paper because they are trying not to say too much?

Tell the group to once again take a minute to reread the dictation that they wrote. Ask if anyone has any questions about something that they wrote or questions whether they wrote something that is not pertinent to the case? Most likely there will be very little of that because what they saw was a 10 minute clip that highlighted key points. What the video did was cut out the unimportant detail that often clutters up a workers dictation. But many of our client contacts are much longer than that and involve two way conversations. Ask the trainees if they write the questions that they ask?

Step 5

Point out to the group that in this advanced writing skill section, we have looked at our tone, our terminology, and our detail. It is time to add to that knowledge by talking about separating case facts from our opinion.

Point out to trainees that this is an extremely important skill for them all to master. The consequences putting too much opinion and too little fact into their case record are potentially severe. Being too verbose only leads to waste and inefficiency. Writing about opinion without specific facts could put you in a position to defend those opinions without your being able to remember exactly why you had them.

On a flip chart, have the phrase: **Mr. Smith showed up for his visit drunk.** Ask the group "have you ever written something like that in a case record? What is the problem with that statement?"

If a year from now, a different caseworker had that case and was on the stand at a termination hearing and was testifying to it, how would the worker answer the defense attorney's question of "how did you know he was drunk at the visit"?

Ask the group how that concept could be written better.

After discussion, show **Overhead #6, Case Fact From Opinion Example #1:**

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

Mr. Smith showed up for his visit smelling of alcohol. He was unable to stand up on his own, leaning against the wall, and he fell as he walked away from the visiting room. Mr. Smith admitted he had been at the bar earlier today but denied being drunk.

The given example is a lot longer, but it is not an example of verbosity. It is an example of pertinent detail, written concisely, factually, and objectively. If six months later, a caseworker had to explain to a judge what happened that day and why Mr. Smith is being required to complete an alcohol evaluation, that caseworker will be much better prepared and able to defend that request.

Refer back to **Overhead #7 Case Fact From Opinion Example #2. Mr. Smith was obviously angry.** Ask the group how this could be better written. They should be able to give some examples.

Show the rest of the overhead: **Mr. Smith continuously cut me off whenever I tried to speak. He frequently raised his voice and told me that “he didn’t give a damn what I said.”**

The trainer should explain that using concrete language is a key to clear, objective writing. It is good to record evidences of your senses, but again try to limit it to case fact, not case opinion. Things seen, heard, smelled, tasted, and touched are all good to document. 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 our interview.”

How many people have written a phrase like “the house was dirty” in a case record? (Write on flip chart for affect) What would be a better way to write that concept? Give examples for the group such as “I observed trash on the floor in the baby’s room” or “there were several days worth of dirty dishes piled in the sink.

Step 6

Show the trainees the second video from the **Child Protective Investigators Procedures Training Video**, case study of **Andy Thompson**. Tell the trainees that they should take notes from the video as they would if they were the caseworker. They should prepare as if they were going to do the dictation from the caseworkers home visit.

Trainer note: after the video, it is always a good idea to review with the group what everyone just saw. Does anyone have any questions about anything that happened on the video?

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

Step 7

Trainer should introduce the next activity as a small group activity. Depending on the size of the training group, trainer should break up the large group into groups of 2-5 trainees.

Each group will be given **handout #10 Use of language**. The handout has statements that are typical that worker may write after having completed a home visit. The statements on the handout are specific to the Andy Thompson video.

Groups are asked to go through handout and as a group rewrite the given phrases using the knowledge that they have gained so far in this training. Ask them to be prepared to identify the problem with the given phrases. Have each group be assigned one or two of the phrases depending on the number of groups. Ask each group to put on flip chart paper the version that they have written for their assigned phrase. When each group is finished, you should hang up their work and have one example of each rewritten phrase on the wall.

Step 8

Go through each phrase, have each group present the what they wrote then have the other groups read out loud their version of the phrase. Use these phrases to review all of the previously listed concepts.

Below are the given phrases with some examples of what the trainer should be looking for the groups to present in their re-written versions.

Please rewrite the given phrases so that they are better suited to be included in a Child Welfare Professional's case notes.

1) Mrs. Thompson seems isolated.

Mrs. Thompson lives in as isolated area with no streetlights, or address signs. According to Mrs. Thompson's neighbor Ruth, Mrs. Thompson has no family support in the area.

2) Mrs. Thompson wasn't dressed for the day.

Mrs. Thompson was still wearing her bathrobe despite my visit being planned.

3) Mrs. Thompson seemed irritable.

Mrs. Thompson raised her voice when I asked if she had checked on Andy today. She also raised her voice and showed me a bottle with some milk in it when talking about Andy wasting milk.

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

4) The house was very dirty.

There were old cigarette packs, trash, and empty pizza boxes on the floor of the home. There was trash on the sofa.

5) Mrs. Thompson has unrealistic expectation for the future.

Mrs. Thompson agreed to take a parenting class and stated that it would be good because maybe she could meet a man there. Mrs. Thompson stated that she is hoping to get a job at an area restaurant because a man promised her a job.

6) Andy's real father is absent.

Mrs. Thompson clarified that Neil is not Andy's real father, and that she never sees Andy's real father. She does get money from him on an inconsistent basis. Mrs. Thompson further stated that Andy's real father has had nothing to do with her since she got pregnant.

7) Mrs. Thompson appears to have a drinking problem.

Mrs. Thompson stated "I know why people drink...they have to come home to kids." She also stated during my visit that "everyone needs a drink now and then." Mrs. Thompson's neighbor Ruth stated that Mrs. Thompson takes a drink or two when she gets lonely or sad.

8) The crib was in disrepair.

The side of the crib was broken and was a danger to Andy due to its sharp edges and lack of stability. If Andy were to roll over, he could fall right through the side of the crib.

9) Mrs. Thompson has unrealistic expectations of Andy.

Mrs. Thompson stated the crib was safe because Andy does not roll over. When asked what she felt Andy's needs were, she stated that food and diapers were all he needs.

10) Mrs. Thompson appeared more concerned about meeting her own needs than Andy's.

Mrs. Thompson was in agreement with attending a parenting class hoping that she could meet a man. She also minimized the fact that she left him with Ruth for weeks by stating "everyone needs a break once in a while." She further stated that the next money she gets, she's going to buy a dress for herself.

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Section IV. Advanced Writing Skills-Pertinent Detail vs. Verbosity (continued)

Ask the group if they have any questions at this point about all that we have learned regarding writing skills.

Pass out **Handout #11 Elements of Good Case Documentation** and review the written concepts with the group.

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Section V. Written Components of a Case Record

Learning Objective: Participant will be able to identify what information needs to be documented in case records.

Method of presentation: Lecture, small group work, large group discussion

Time: 60 minutes

Materials needed:

Pennsylvania Child Welfare Practice standards manual

Handout #12 Documenting the Assessment process

Handout #13 Documenting Key Issues and Decisions

Resources used: Pennsylvania Child Welfare Practice Standards Manual

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Section V. Written Components of a Case Record

Outline of Presentation:

The trainer will introduce the concept of “components of a case record” and the point that while participants will be always trying to be accurate and concise, they may be writing toward certain goals during different components of the case. Large group discussion will develop what the different components of a case record. Child welfare Practice Standards will be introduced. After that, participants will be broken up to do work on a fictional case and given a component of that case to develop. The whole group should quickly develop a whole case document and the trainer will be able to lead discussion on what it was like to write for each component, including references to Practice Standards for each section.

Step 1

Remind participants that they have discussed functions of a case record but not the specific components of a case record.

The trainer should have a flip chart made up which outlines the following child welfare job functions.

- 1) Intake/assessment (screening)
- 2) Abuse investigations (CPS)
- 3) GPS-ongoing in home services
- 4) Foster care/Adoption services

The trainer should then explain to the group that the documentation process might take on a certain specific focus depending upon where the case is within the process. In the Derrick Johnson video, how the worker documents Derrick’s injuries and statements about pain or impairment are very important. In the Andy Thompson video, how the condition of the home is documented now may become a key piece of evidence at future court hearings.

The trainer should review the specific job functions and give a brief example or what they are referring to. Follow the guideline given below.

Intake/assessment (screening)-different counties are set up and function differently. For the purpose of this training, we will be working as if our county has a specific unit for accepting referrals and making initial assessments before passing it on for ongoing investigation or in home services. Some counties call this an intake unit, while some counties refer to their CPS unit as intake, so the trainer will have to be sure that everyone understands that the function we are discussing here is for initial assessment and screening before being passed on for investigation.

The primary focus of the case documentation for an intake/screener would be how they assessed the immediate risk to the child and assured the child’s safety before passing the case on for investigation. Intake workers need to document how they have come to the conclusions that they have (CPS vs. GPS) in such a brief period of time, and who

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may have assisted them in that decision. They need to document how they determined the validity and seriousness of the information that they received and any outside referrals that they make.

Abuse investigations-CPS investigators must document efforts to see the child immediately to assure their safety. They must document appropriate notifications to the family and law enforcement. Further, they must be able to document injuries and their interview techniques (questions). They must be aware of what type of documentation their local District Attorney would like to see in their cases that have law enforcement involvement.

In home services (GPS)-GPS workers have to be able to document their safety assessments and how Family Service Plan objectives were developed. Often, GPS workers are building cases that may go to court months later for custody of a child. It is important that they document such items as condition of a home and alleged drug use by parents in terms of the effect that these things have on the child.

Foster Care-Foster care workers need to assess parents in terms of their ability to get their children back or begin to work on alternatives to reunification. Foster care workers need not to just document that a visit happened, but the quality of a visit, and the reactions of all family members to visits at the completion of a visit. Foster care workers continually have to assess their families in terms of movement towards completion of objectives.

Step 2

Notify participants that you are aware that they use certain tools to complete transitions from one section to the other (risk assessment, service plans...) which require their own documentation. We will be looking at those tools later. Now we are looking at the concept of what each case narrative component is going to require us to document in terms of the skills and knowledge that we have acquired so far today.

Step 3

Break the trainees into groups based on their actual job function. Choose from any of the above listed first 4 groups-intake screening, CPS investigation, in home services, or foster care.

Trainer note: If a participant can't identify with any of the above groups, place them into a group as needed. Try to spread out big groups, breaking them into two if necessary. Groups should be no bigger than 5 to allow everyone to participate.

Step 4

Once each trainee is in a group, distribute **handout #12 Pennsylvania Practice Standards-Documenting the Assessment Process**, and **handout #13 Pennsylvania Practice Standards-Document Key Issues and Decisions**, and review with the group

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what is expected within each documentation section as per Pennsylvania's practice standard guidelines.

Explain to the group that Pennsylvania has theoretically developed these practice standards to guide practice. Tell the group that while these guidelines are not currently regulation, it is a standard that workers are going to be held to in the future in Pennsylvania. Remind the group the reasons for the importance of case documentation as discussed in earlier sections.

Step 5

Give out scenarios to each section. Scenarios are on **Handouts 14-17**. The scenarios are specific with 5-6 different things for each group to document. As a group, they should choose a recorder and write out case narrative for the given information. Give each group time to complete their case documentation. Remind the group to try to incorporate all of the information that has been given to them today regarding the importance of case documentation, what needs to be documented, and writing skills. They should incorporate this information in terms of their specialized sections and attempt to emphasize the issues that were discussed for their group.

Step 6

Allow groups proper time to proceed. Trainer should circulate, looking for questions or non-participation.

Step 7

When every group is done, explain a complete case record narrative should have been completed. It would be somewhat tedious to read through each of the four group's complete narratives. **(Trainer note: if you have the time at this point and you want to – feel free.)**

Trainer should explain that instead, the group will look in general at what challenges confronted each section to be written and if time allows, trainer should ask each group to read just one excerpt from their group.

Trainer should emphasize the following points from each group:

Intake: who was referent-walk in/caller? How was the preliminary risk assessment completed and documented. How was the case decision whether or not to register the case as an abuse made? How did the intake worker attempt to assess the validity and seriousness report? How was supervisory review conducted and documented? Were any other referrals made for this family?

Abuse (CPS): How quickly was the child seen. Did that contact result in a safety assessment and plan? How was the perpetrator notified of the report? How were the injuries described? How was the disclosure elicited? Was there anything within the investigation that the district attorney's office might not want in the dictation? Were any experts consulted?

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Trainers note: each county in Pennsylvania is required by the Child Protective Services Law to set up a relationship with their local District Attorneys office and have a protocol for collaborative investigation. Most prosecutors will emphasize the need for police notes and CPS workers notes to be consistent. This is especially true in regard to sexual abuse investigations where often times the only pieces of evidence are the statements made by a child to investigators.

In home services (GPS): Have the Family Service Plan objectives been met? Has the worker seen every child in the family and completed a home visit at least once a month? How did the caseworker build a case that provided reasons for the placement of the child?

Foster care: what has been the quality of visits? How has progress been made and measured toward completing service plan objectives. What have the contacts with foster parents been like? Has there been any movement in the development of a permanency plan?

Step 8

Point out to group that while certain rules of writing apply across the board, obviously certain happenings need to be included in your case documentation. Workers should remember that you are writing about information as it pertains to “what does this information have to do with the reason that I am involved with the child?”

Step 9

Ask the group how many of the written sections they completed specifically identified strengths within that family. Writing strengths of families and situations is an important skill to remember and provides balance within your case documentation. Trainer should point out specific strengths to be found within Intake, CPS, GPS, and F.C. sections. Ask the group if they are aware of a specific child welfare form that requests the worker address the family’s strengths? Risk assessment.

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Section V. Specialized Sections Within Case Records

Learning Objective: Participant will recognize documentation needs for specialized case record sections.

Method of presentation: Lecture, large group discussion, and small group work.

Time: 30 minutes

Materials needed: Pennsylvania Practice Standards
Handout #18 Pennsylvania Practice Standards-Writing the Plan Handout #19 Miller Family-Closing Summary.

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Section V. Specialized Sections Within Case Records

Outline: Trainees will discuss specialized sections of the case record that require case documentation i.e. risk assessments, family service plans, and transfer and closing summaries.

Risk assessment and family service plans will be reviewed with the large group with specific exercises available to the trainer if time permits. Trainer will emphasize closing summaries and writing clear, concise, accurate statements. Activity will give participants chance to review all the work previously completed throughout the training day.

Step 1

Ask participants: besides written ongoing case notes, what other tools do we use for case documentation? (Remind them that title for the course, "Writing skills for case documentation")

Answer? At a minimum, workers should mention risk assessments, court sections, Family Service Plans, and case summaries.

Step 2

Express to participants that risk assessment forms require a written section that justifies case decisions. The purpose of risk assessment is to give workers a decision making tool to justify case decisions, and allow for prioritizing family service plan objectives. If case comes under scrutiny, risk assessment justifications will be one of the first documents reviewed and written explanations must justify case decisions.

There is other training on risk assessment and this training will not emphasize the need or purpose of risk assessment. The trainer, however, should emphasize the point made in the day's introduction. The words you write cannot be taken back. When writing your risk assessments, review your keys from today, and write clearly, concisely, and accurately.

Trainer note: If time allows, trainer could complete closing risk assessment for case just developed by trainees. Trainer could use risk assessment documentation as a "swing" activity to be made as long or short as needed depending upon timing of training and trainees interest and concentration levels.

Step 3

The same as above is true of court documentation and family service plans. Family service plan objectives are often prewritten and PACWIS will give workers the opportunity to just choose Family Services Plan objectives. Be sure to continue to do your Service Plan specific to family needs and not do generic. Don't take the easy way out.

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Section V. Specialized Sections Within Case Records (continued)

Step 4

Pass out **Handout # 18 Write the plan**. Review the main points within the handout for workers to keep handy when writing plans. Trainer should again emphasize that the practice standard is not regulation, but it is the standard that workers will be held to in the future.

Step 5

Trainer should ask the group why closing and transfer summaries are important. Trainer could follow that question up by asking who in the room has ever read a closing or a transfer summary on a new case got, and that was all you read, at least for a while. Summaries encompass all that we have talked about to this point. It documents services and clear, concise, accurate, strength based summaries are vitally important to the success of good case documentation. Pass out **Handout #19, Miller Family-Closing Summary**.

Step 6

Using **Handout # 19, Miller Family-Closing Summary**, participants should review the prewritten closing summary. Depending on time, the trainer could do this activity as a large group discussion, or a small group activity.

Have the trainees find at least 3 things that the author did well based on what has been learned today and 3 serious mistakes by the author.

Trainer note: The handout has been formatted to that you can refer to line numbers when discussing the content of the summary. Some noticeable problems include poor sequencing, unprofessional tone (4), poor use of pronoun (6), confusing use of number (12), impertinent detail (16). Good aspects of the summary include good use of abbreviation (8); good explanation of opinion based on facts (13-16), and good specific detail (21-25)

Trainer can also use this opportunity to express that generalizations in summaries are appropriate if the specifics are included in the case record and referenced to the appropriate date or page.

Write responses on a flip chart if working in a large group. Have small groups list their findings on their own flip chart for review and hanging.

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Section VI. Skill Building

Learning Objective: Participants will review all previous learning and begin to incorporate new learning into their practice.

Method of presentation: Video, individual work, peer review.

Time: 45 minutes

Material needed: Child Protective Investigators Procedures Training Video, Jerry Baker segment.

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Section VI. Skill Building

Outline: During this section of the training, trainees will watch a video and be asked to complete a case narrative as close as possible to what they would put in an actual case record.

Participants will then trade off their work for review by a peer. Peer will critique the work of the anonymous author of the paper they are reviewing. Papers will be returned to original writers, and learning reviewed.

Step 1

Trainer should begin this section by discussing timeliness of case dictation and ask participants how quickly after a client contact do they generally write the dictation. Review good practice standards (3-5) days and ask participants if they really believe they could write the same narrative 4 days after a half hour home visit as they could that same day. Suggest to the group that the only way to write good case narrative days after the client contact is to have extensive, detail laden, and sequential notes from the contact.

Express to the group that the trainer understands that often times it is difficult to take notes in the middle of a client contact, and when the meeting is complete, it is usually impossible to sit and write out a complete case narrative.

Trainer should then suggest that the worker should at least sit and make out a detailed, sequential, outline of the client contact for use later when writing the dictation.

Step 2

Show the trainees the “Jerry Baker” video (12 minutes) from the CYF case study video. This video is full of concepts to write about including caseworker’s opinions on both parents, the condition of home, possible alcohol consumption, the mother’s relationship with child, strengths and weaknesses in father’s work, lack of community support, child’s diet...

Step 3

At the completion of the video, have workers take 10-15 minutes to write out a complete case narrative. Tell the that despite the late hour of the day, this will be their last real chance to practice improving their writing before taking what they have learned into the field. Have participants write a phony (funny) name at the top of their sheets.

Step 4

Collect all of the narratives and redistribute them. Trainer should take care not to distribute sheets to the original writers or their neighbors. Have participants critique narratives that they have been given anonymously based on information learned in today’s training. The trainer may want to have red pens available for participants, but remind them this is review and meant to be constructive, not mean spirited. Trainer should point out that everyone learned something different today and here is everyone’s opportunity to pass something they learned on to one of their peers.

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Section VI. Skill Building

Step 5

Redistribute sheets back to original owners by placing them on a table and having people find their own. Consider calling out names and lightening the mood of the group, but some participants may not want their actual identities revealed to the person that critiqued their work.

Step 6

Trainer will now have the opportunity to discuss the day's learning. Trainer could ask what were some of the good things trainees now see in their own work? What did someone else correct that should not have been corrected? How did it feel to know that someone else was reading your work? Did you try to write better knowing it was to be reviewed? Would it be helpful to you as a caseworker to consider that your work always has the potential to be reviewed?

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Section VII. Review

Learning objective: Participant will review information learned during the training, and share information learned with other participants.

Method of presentation: Large group discussion

Time: 15 minutes

Material needed: Evaluation forms

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Section VII. Review

Outline: trainer will ask participants to review their “bright ideas” that they took note of during the training. Trainer will pass on their main ideas from the training day.

Step 1

Congratulate participants for a job well done. This is a training that requires work more than most. It was not an opportunity to just come and listen and escape work for the day. Hopefully, each participant got something today that will make future workdays better and more productive.

Step 2

Ask willing participants to share any of their “bright ideas” from the training day. List their points as presented on a flip chart.

Step 3

Trainer presents their main ideas from the training day on a flip chart.

This list should include:

- 1) Value good case documentation. It may save you or a child that you work with.
- 2) Take time to write correctly, you never know who will be reading your work.
- 3) Write facts, not opinion
- 4) Record information in a clear, concise, and sequential manner
- 5) write not as you speak, but as you would like to read.

Step 4

Remind participants of bibliography available to them

Step 5

Complete evaluations