

Guidelines for Documentation

Accurate documentation brings information back into focus a considerable time after the event. The rules for documentation are designed to ensure accuracy of information and actions taken.

A record of all the activity performed with respect to the referral should be documented. Such activity includes but is not limited to the following:

1. Direct and telephone contacts with the child, the parent, Children's Aid Society/Family and Children's Services and others involved in the referral –
 - a) Decisions taken and the rationale for these decisions.
 - b) Decisions to vary policy and the rationale on which they were based.
 - c) Consultations and discussions with Children's Aid Society/Family and Children's Services and/or other school personnel.
2. Begin the documentation with the data. The time of disclosure and the time of contact with Children's Aid Society/Family and Children's Services should be noted. Write the date and time of all contact with others involved in the referral.
3. Identify by name the person(s) to whom you spoke and their relationship to the child.
4. If you spoke with the child/parent, etc., record "spoke with" parent and not parent "seen".
5. The note should clearly state where the contact with the person occurred; i.e., home visit, office visit, case conference or telephone call. The note should also spell out who was present at the contact.
6. Documentation should record events observed by you, what was said by the child, by you and by Children's Aid Society/Family and Children's Services and by any person involved in the case. If significant action is taken with respect to the child documentation should outline the information upon which the action was based.
7. Handwritten documentation should be completed in black ink to ensure clear photocopies if required.
8. Each page must be signed legibly. Typed documentation must end with the following signed statement: "I certify that these are the notes of John/Mary Doe".
9. **Be Timely.** Notes should be made contemporaneously with the event, shortly hereafter or within 24 hours of the event.
10. **Write Legibly.** Notes should be written legibly and in sufficient detail that another person reading the notes can understand the nature of the activity carried out. Ensure entries are chronological. If a blank space remains on a page, a pen stroke must be made through the remainder of the page.

11. **Record Facts.** In recording an observation, include the following: when, where, who, the time of day and duration of time, what was observed and what conclusions were made. Notes should be factual and non-judgmental. Conclusions and opinions contained in the notes must be strictly limited to those which can be substantiated by fact. When in doubt, do not draw conclusions, just state facts. For example, “Johnny came to school unhappy and upset with his mother”, is a conclusion. A fact would state, “When Johnny came back to school after lunch, he came to me and began to cry. When I asked him what was wrong he said he hated his mommy”. Facts such as this are generally obvious and speak for themselves.
12. **Be Concise.** Use short statements and sentences preferably in a narrative form. Common abbreviations may be used but point form is not generally recommended as the intent of the notes may not be clear to another reader.
13. **Be Accurate.** If the words used are important, write the actual words in quotation marks. Notes must not be altered but errors may be corrected if initialed and if crossed out in a way that leaves the original legible.