Case Recording & Report Writing for Social Work

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Objectives of Session

- Explore the principles of professional writing & recording
- Consider some of the pitfalls of recording through group exercises
- Be informed about structuring & editing reports
- Understand how legislation influences recording
Introduction

• Social work is a complex job & practitioners have to manage a number of competing, & often conflicting, demands on their time. Recording is regarded by some practitioners as a low priority activity. (Kagle, 1993)

• Link between recording & practice is well established
What is professional writing?

- Recording factual information about people in contact records/notes
- Multi-agency sharing of information about a person
- Sharing information with service users, families & carers
- Specialised skills relating to analysing information
• Communicating a professional opinion about a person
• Writing reports which focus on informing an audience to make a decision about a person’s life
• Making recommendations & formulating plans of action
• Adhering to deadlines

(Aberdeen Guidance Booklet, pp. 5-6)
Professional Writing is underpinned by

• Conceptual Knowledge

• Instrumental Knowledge

• Tacit Knowledge
General Expectations

- Plan carefully before starting to write
- Use everyday standard English
- Explain any technical terms used
- Use accurate grammar, spelling & punctuation
- Do not rely on spell checkers
- Avoid using humour & anger
• Be careful when using similar sounding words eg. Depraved/ deprived
• Write in the first person
• Sentence length – 15 to 20 words
• Avoid needless repetition
• Think of the reader
• Always date & sign written communication
Guidelines state that records should be:

• Legible, clear, dated, signed, precise, objective
• Accurate & factual
• Reasons for decisions carefully documented
• Opinions supported with facts
• Irrelevant opinion omitted
• Various rules regarding length of time records are kept
Recording Text Messages

• Text messaging must be regarded as service user contact & recorded in case notes
• Generally should only be used as a reminder or question about an appointment
• Text language can be used when recording
Recording E-mails

- Always check that the e-mail address is correct
- It is best to open/close e-mails with Dear/Best Wishes or Regards
- Write with the same care used to write a formal letter
- Proof read before sending
- Should be clearly titled in subject box
Recording Case Notes

- Be logical, succinct & to the point
- State who the contact is with & their relationship to the service user
- State the purpose of the contact
- Record direct observations
- Provide the service user’s/professional’s views
• Intelligible to others
• No unexplained significant gaps
• Not used as a platform to air professional differences of opinion?
• Remain focused on the agreed action plan
Recording Supervision Notes

- Is there an agreed policy in relation to supervision records?
- Are case discussions/decisions made during supervision clearly recorded on the file?
- Are reasons for cancellation of supervision recorded?
Recording Chronologies

• Succinct recording of significant events
• In ascending date order – earliest date first
• Systematically & regularly shared with relevant professionals
• Used as a tool in accessing progress & levels of concern
• Used to inform the decision-making process
Storage & Security

- Personal information should not be deliberately/inadvertently viewed by uninvolved parties
- Files should be kept locked in a filing cabinet when not being used
- No files should be left on desks when staff are not in the office
- Passwords should not be shared amongst colleagues
Remember

• Written communication will become a permanent record that the practitioner may have to defend at a later stage

• Recording can make a major contribution to staff development in the areas of assessment, analysis, care planning & professional decision making

(Aberdeen Guidance Booklet, p.2)
Summary

• Recognise that recording is an important task, not just for the agency but for the service user or carer
• See recording as an integral & important part of your practice
• Plan your recording
• Record information as you go along
• Allowing recording in complex cases to accumulate can result in you being confronted by a seemingly impossible amount of paper work

(Write Enough, by Walker et al)
Group Exercise
Definition of “report”

An account prepared for the benefit of others, especially one that provides information obtained through investigation

_Collins English Dictionary, 2000_
Features of reports

• Set out a series of evidence-based facts
• Information can be checked
• Information is presented in a certain way
• Aimed at readers who have special interest
Types of Reports

• Factual Report - need to inform the reader of a fact/a range of facts

• Narrative Report – tell a story

• Report which presents an argument – author states position, pros and cons and conclusion
Getting started

Novice writers are big procrastinators. They find countless reasons not to get started. Even when they finally get themselves seated at their desks, they always seem to find diversions: make the coffee, sharpen the pencil, go to the bathroom...... Remember that you are never ready to write; writing is something you must make a conscious decision to do and then discipline yourself to follow it through.

(Bogdan and Biklen, 1982)
Getting started - preparation

• Remember that we always have two thirds more information than required
Getting started – Practical

Have:

• all information to hand
• all the materials required
• a tidy space to work
• a quiet space to work
Getting Started - Purpose

Why?

Who?

When?

What?
Getting started – why?

• Purpose of report needs to be clear

• If this is unclear you need to clarify this before starting to write

• Who will clarify purpose for you?
Getting started – who?

• Who will be reading this report?
• What do they know already?
• What do they need to know?
• What are their literary skills?

Look after your audience
Getting started – when?

• Set aside time

• Submission Date

• Is it required in advance?
Getting started – what?

• type of report?

• information will your audience have after reading the report?

• information do you require to complete the report?
Structure of Report –
Essential Headings
**Introduction** – details of author, involvement with subject, purpose

**Body of report** – longest part, describes events

**Conclusion** – main conclusion(s) summarised briefly & simply

**Recommendations** – only use when asked
Structure of Report - Subheadings

- Cover page/title
- Purpose of Report
- Family Composition – table
- Summary – no new information
How does your report look?

Consider the following:

• Headings in **Bold**
• Quotes in *Italics*
• Pages numbered
• Short sentences & paragraphs
• Well spaced, with wide margins
Most Important!

AUTHOR?

DATE?
Writing Your Report

The Process
Stage One

- Write down headings you will use
- Write something under each heading
- Don’t have to follow sequence
- Create draft of all relevant information
- You can edit later
- Think about conclusion
Stage Two

- Sift through your evidence
- Make judgments about which data have to appear in full
- Which data can be summarized?
- Use appendices
Stage Three

• Write down relevant facts
• Distinguish reported facts & observed facts
• Give details of key interviews
• Include views of clients/patients
• Include references from previous reports/research
Opinions

- Opinion – belief/judgment/interpretation
- Opinions must be acknowledged, informed and evidence based

<table>
<thead>
<tr>
<th>Opinion</th>
<th>Fact</th>
</tr>
</thead>
<tbody>
<tr>
<td>He is an alcoholic</td>
<td>I smelled alcohol on his breath</td>
</tr>
</tbody>
</table>
Use Plain English (1)

- Short sentences - 15-20 words average
- Short paragraphs – dealing with one point/idea
- Avoid jargon – explain if it is used
- Use active voice e.g. you must, rather than it is mandatory
Use Plain English (2)

- Use the short word instead of the long

<table>
<thead>
<tr>
<th>try</th>
<th>attempt</th>
</tr>
</thead>
<tbody>
<tr>
<td>end</td>
<td>terminate</td>
</tr>
<tr>
<td>start</td>
<td>commence</td>
</tr>
<tr>
<td>more</td>
<td>additional</td>
</tr>
<tr>
<td>about</td>
<td>approximately</td>
</tr>
<tr>
<td>happened</td>
<td>transpired</td>
</tr>
</tbody>
</table>
Use Plain English (3)

• Avoid words that have a number of interpretations

Example:

often, rarely, sometimes, numerous, seldom
Plain English?

Each person with an intellectual disability will have a high quality service, which will enable them to attain their own personal goals, and they be afforded the same right as any other individual in society.

Mission Statement of Learning Disability Service
Writing – The Process

Summary

• Write under headings

• Decide what to include/exclude

• Use plain English
Writing Your Report

Editing
Editing

Involves looking at the report and thinking about how it can be improved
Review your Report (1)

- If possible leave report aside
- Ask somebody else to read it
- Re-read your report, and check for the following:
  - Typing errors
  - Spelling mistakes
  - Grammatical errors
  - Numbering
Unedited writing

Presentation is everything. Unedited writing is difficult to read, makes your reader irritated. **Your report says a lot about you as a professional and if your report looks careless or sloppy then …..**

Unedited writing is difficult to read, makes your reader irritated. Your report says a lot about you as a professional and if your report looks careless or sloppy then …..
Review your Report (2)

Punctuation

- Full stops, commas, colons put in writing to assist in making sense clear
- Use full stops instead of long sentences
- Use a comma to indicate to reader that they should take a breath
Full Stop Needed!

Some of the above course dates may need to be changed, if so adequate notice will be given in these circumstances

Calendar of Training Events 2005
Using the Apostrophe

It’s V. Its

- Use it’s only instead of it is or it has
- In all other circumstances it’s always its (possessive case)

Examples:
Thank God it’s Friday V. the world and its mother
Review your Report (2)

Is the report:

• Logical
• Sensitive – politically correct
• Balanced – compiled using various sources of information, & outline family strengths
• Reader friendly – headings, spacing
• Accurate
Possible results of not Editing!

Judaism

Once death occurs the body should not be touched unless the local rabbit gives permission

Advise to staff from the Culturally Diverse Health Care Information Pack of a Hospital, 2004
Writing your report

What the legislation says
Freedom of Information Act, 1997

• “An act to enable members of the public to obtain access, to the greatest extent possible consistent with the public interest and the right to privacy, to information in the possession of public bodies”

• Entitles people to have personal information relating to them …corrected
Freedom of Information

- A procedure for applying for such information was introduced
- The office of information commissioner was introduced
- Defines a record as any
  “memorandum, book, plan, drawing, diagram, pictorial or graphic work... held or stored manually, mechanically or electronically”
Implications for Staff

• All records created by staff may be the subject of a request under this Act
• Records must be accurate and legible
• Records should be relevant, and objective
• Assume client/service user will read record

- Data protection is the safeguarding of the privacy laws of individuals in relation to the processing of their personal data.
- Gives a right to every individual to establish the existence of personal data, to have access to any such data and to have inaccurate data rectified or erased.

- Concerned with protecting personal privacy
- Applies to manual & electronic data
- Personal health information should only be used for the purpose for which it was collected
Principles of Social Work Practice:

8. SW’s, having taken into account the rights of others, will provide service users with full information, including access to records pertaining to work on their behalf. SW’s should be prepared to state the reasons for their decisions & be accountable for them.
9. SW’s will respect a service user’s right to confidentiality in the SW/service user relationship. It is the duty of the SW to ensure that the nature & limits of the privacy in their relationship are clearly understood & applied.
Code of Professional Conduct & Ethics for Social Workers

- Specifies the standards of ethics, conduct & performance expected of registered SW’s.
- Particular duties in relation to recording are:
  - Keep accurate records
  - Treat information about service users as confidential
Keep accurate records

a) You must keep clear & accurate records according to the policies & procedures in your workplace.

b) You must keep records for each person who asks for/receives advice/services.

c) All records must be complete, legible, identifiable as being made by you, dated, prepared as soon as practicable, clear & factual.

d) If you supervise students, you must review each student’s entries in the records.
e) When records are reviewed, you must update them & note any arrangements for the service user’s continuing care

f) You must make every effort to protect information in records against loss/damage & against access/use by anyone who does not have permission to access/use them

h) SW records should be based on professional assessment which is regularly reviewed & updated

i) You must hold & use records according to relevant legislation
Treat information about service users as confidential

a) You must treat information about service users as confidential & use it only for the purpose for which you obtained it

b) You must not knowingly release any personal/confidential information to anyone who is not entitled to it

c) You must only use information about a service user to provide service to that person

d) You should consult service users about their preferences regarding the use of information about them

e) If disclosure of a service user’s information is necessary as part of their care, you should take reasonable steps to ensure that you make such a disclosure to an appropriate person
Clear accurate report writing is essential

Often the use of language in reports contributed to the vagueness of decision making. Phrases such as “all well” and “no concerns” are commonplace but are not backed up by supporting evidence or subjected to any interrogation.

(Roscommon Child Care Case, 2010)
Summary

Do:
• Allow sufficient time for task
• Use headings to structure report
• Look after your audience
• Edit report
• Assume client/patient will read report

Don’t:
• Write report at last minute
• Write long sentences, and paragraphs with many topics
• Write opinions if they are not based on fact
• Forget legislation & agency policy