Getting Write to it:
Writing Good Case Notes

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Council of Senior Centers and Services of New York City, Inc.

Your presenter today,

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Our Agenda Today

1. Why do we need to write case notes?
2. How do we do it?
   - Getting Focused
   - Case note Content
   - Keeping it relevant, concise
3. What you bring to the process
   - Observational Skills
   - Writing Skills
4. Be your own case note coach
   - Motivation and rewards
Why do we need to do it?
For ourselves and our agencies -- professional responsibility and development

• Its historic place in human services
• A permanent, legal record of activities
• Orderly and systematic management of cases
• “If it isn’t written down, it didn’t happen.”
• A tool used to reflect on our service delivery and to learn and improve our services
For our funders – government and foundations

Case notes capture these important factors that funders need to know:

• services match the clients’ needs
• programs are performing as expected
• programs are cost-efficient and cost-effective
• programs produce results
For Our Clients
For our clients -- it’s part of our service to them

Writing effective case notes is an extension of our delivery of service:

• reflecting respect for our clients and the issues they are dealing with
• acknowledging our responsibility to them as their service provider
• honoring the relationship we have with them, the lives that they are sharing with us
For You
For you – an opportunity to learn

Writing is a form of communication and this is your chance for further professional development:

• if you’re planning a life long career in human services, writing skills are critical for your success

• If you’re thinking of another career, chances are good that writing skills will be necessary

• the world of work in general is demanding increasingly high levels of competence and writing skills will be expected
How do we do it?
Different funders have different case note requirements...
Different supervisors have different expectations for case notes...
And different workers interpret requirements and expectations differently...
Clarity of Expectations

Start by getting clarity regarding the requirements and expectations for your case notes.

• Review your case notes with your supervisor to determine the specific content you are to include, the format, the length of the note and other organizational details – the structure.

• Create an outline for yourself as a tool to actively use when writing your notes.
General Case note Content
Basic Information

- Client identifying information
- Worker identifying information
- Date of contact (perhaps time and place)
- Type of contact
Content Concepts

Case notes generally should:

• Reflect back on service plans
• Address the goals established for the client
• Address progress toward the goals
• Discuss concerns regarding the lack of progress or obstacles in progress toward the goals
• Discuss what are the next steps toward the goals
Sample Case note Outline

Case manager’s/caseworker’s name
Date of case note
Client’s name
Date of visit/session
Observation (changes?)
Purpose of visit/session
Topics discussed
Movement toward goals since last visit
Obstacles toward progress re: goals
Brief summary, next steps
Keeping it Relevant

• Stay focused on the content outline
• Only add other/new issues if they pose an obstacle or challenge to making progress
• Don’t add personal opinions without facts and/or observations to back them up
• Don’t diagnose
What You Bring to the Process
Your Observational Skills

• An essential asset for human service workers

• Informs us about our clients’ health and wellbeing

• These are skills that can be learned and developed
How Observant are You?

How observant are you in your work with clients?

Make a conscious decision to be more present, more aware using all of your senses:

• What do you see?
• What do you hear?
• What do you smell?
• What do you feel (touch)?
Exercise Your Skills

Observe a person sitting in a public space. Write down what you see:

• The big picture -- Capture what you see immediately with little or no careful scrutiny.

• The details -- Now go back and see what details you can find to add to the big picture.

• The unseen details -- Change your seat and what do you see now, what other details can you add.

• Try this with a friend or colleague and then compare notes to see how observant you both are.
Your Writing Skills

• Increasingly important for human service workers

• Relates back to the first question, “Why do we need to do it?”

• Competent writing reflects positively on you

• It’s a skill that can be learned and developed
Read to Learn to Write!

If you’re a reader, take time to explore the actual writing of whatever material you’re reading.

If you’re not a reader, try exploring a newspaper.
Newspaper Exploration

Consider:

• the simplicity of the sentences
• the simplicity of the words chosen
• how paragraphs break up the writing with a specific focus
• the style which is business-like in tone
Get Ready to Write!
Set Up Your Space

• Gather your tools: paper, case note forms, notes, pencils, pens, laptop, case files, etc.

• Make yourself comfortable: settle into your chair, makes sure you have your coffee, tea, soda or water, take off your shoes if that helps.

• Before you sit down, get all distractions out of the way – bathroom, snacks, hand washing, etc.
Open Your First Case and...

Think before you write

• re-read (if possible) your previous note
• refer to your outline for clarity
• identify key facts (observations, information)
• identify key themes (the purpose of your session, the goals, progress, obstacles to progress)
Then Start to Write

Refer to your outline

• Write short paragraphs
• Write brief sentences
• Choose simple words
• Use a professional style –
  no contractions (isn’t, can’t, wouldn’t)
  not chatty, more serious
keep it concise and to the point
Common Writing Challenges

• Punctuation
  correct use of commas
  use of extraneous punctuation ; : -- ‘ ( ) & ” ”

• Grammar
  use of verbs with plurals (They is, We has)
  use of the past tense (adding “ed”)

• Spelling
More Complex Writing Challenges

• Word choice – using the correct words to convey the idea

• Syntax – the order of the words and phrases to create a well-formed sentence

• Semantics -- the meaning of the phrase, sentence or paragraph
Face the Spelling/Grammar Challenge

• Use your computer functions
• Learn to write with a dictionary on your computer (make it easily accessible)
• Or buy a dictionary and keep on your desk

When in doubt – look it up!
Check your “special” word choices!
Grammar, Syntax, Semantics

You’ve written your note, now

Read it out loud

Pay close attention as you read to:

• catch the errors in grammar and word order
• determine if the phrase or sentence captures what you really meant to say
• determine if you’ve used too many or need commas or periods

Roberta Herche, LCSW
A Word About Punctuation

There’s only one way to tackle this challenge...

Get a simple book on punctuation

• learn about comma use
• comma faults
• when to use a semicolon
• when to use a colon
• how to use quotation marks and periods
Resources

Books are available to learn:
- punctuation
- grammar
- writing style

Take a course:
- basic business writing
  (community colleges, adult continuing education)
Be Your Own Case note Coach
Setting Goals

• How many case notes do you need to write (to catch up, to stay current each week)?
• How many notes can you write in an hour?
• So, how many hours of writing do you need to complete each week?
• How long at one time can you realistically devote to writing notes? (one hour at a time, more?)
Case note Time Management

Schedule “Case notes” time on your weekly calendar (datebook, phone or computer)

• If possible, pick a time that’s the best for you.
• Based on what you determined when you set your goals, block out enough time on your calendar during the week to complete the number of notes you need to complete each week.
Memory Helpers

• Case notes written immediately after a client visit/session will be the easiest as your memory will be the sharpest.

• If you can’t write them immediately, take very brief notes to remind yourself.

• Use the outline you created to write “buzzwords” and phrases to remind of the relevant details.
Reward Yourself!

Robertta Herche, LCSW
When You Meet Your Goals

to improve your case note quality
to stay current with your case notes

It’s time to pause and acknowledge what you’ve accomplished:
• Share the good news with friends and family
• Brag about yourself
• Pat yourself on the back
• Do something good for yourself

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Mission Accomplished
Any Final Questions