

Professional Documentation Tips

Documentation Tip	Do this...	Not this...
Use full sentences, paragraph form	CM White completed a home visit with Sarah Jones and Thomas Nelson. No health or safety hazards were observed in the home.	HV on Jones/Nelson case. No hazards. No concerns. Nothing else to report.
Use past tense in case notes Do not change tenses	Ms. Hall discussed rules and consequences. She stated that she has never fallen.	Ms. Hall discussed rules and consequences. She <i>states</i> that she never falls.
Use third person perspective	CM Foss met with Dr. Wu and she stated...	I met with Dr. Wu and she told me
Start contacts by identifying who the person is in relation to the case. Add contact information	CM Dunn met with Ms. Sheila Kellogg (Daughter, 804-333-3333)	CM Dunn met with Ms. Kellogg, who stated that she has no concerns about the parents.
Refer to adults with title and last name	Mr. Jones, Mr. Smith, Ms. Little	Frank, Paul, Keisha
Use full terms for mother, father (relationship)	Mother, Father, Grandmother, Grandfather	Mom, Dad, MeeMaw, Grandpa
Do not use contractions	Do not, Does not, She is	Don't, Doesn't, She's
Identify CM by last name	CM Jackson met with the family at their home.	CM met with the family at their home.
Substitute nouns for pronouns	Ms. Harris told Ms. Clark that Mr. Harris is out of town.	She told her that he is out of town.
Use full dates	Ms. Garcia scheduled the appointment for 4/19/2016.	Ms. Garcia scheduled the appointment for next Tuesday. Or Ms. Garcia scheduled the appointment for the 19 th .
Use professional courtesy	CM Baker, the previous CM, stated that Mr. Turner has chronic issues with substance abuse, and although he has repeatedly agreed to seek treatment, he has not participated in any treatment program.	CM Baker stated that Mr. Turner cannot be trusted to do what he says he will do. She said he was a "hot mess."

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Avoid amplifiers Avoid judgmental words Avoid absolute words.	CM Cotton observed trash piled throughout the home, preventing clear walkways. There were feces smeared on the bedroom walls.	The house was very dirty. There was nasty stuff on the walls. Mr. Jones never cleans the house.
Avoid unverified diagnoses	Ms. Jones has a flat affect, is refusing to eat, and sleeps 14-16 hours per day, according to facility nursing note. Or Medical records from Ocean Psychological indicate that Ms. Jones is diagnosed with major depression.	Ms. Jones is depressed.
Avoid unverified diagnoses	Ms. Johnson stated that the FBI and the CIA are infiltrating her brain and she believes that CM Wall is a secret agent from the FBI.	Ms. Johnson is paranoid and delusional.
Use descriptions instead of conclusions	CM Slate observed that Mr. Miller's speech was slurred and he stumbled when he walked. CM noted a strong smell of alcohol.	Mr. Miller was clearly drunk.
Use descriptive facts instead of drawing conclusions	Client has no reported or observed medical issues.	Client is healthy.
Use descriptive facts instead of drawing conclusions	The client lives in a residential neighborhood with a low crime rate, according to the VB police website.	The family resides in a good neighborhood.
Attribute "facts" to the source	Mr. Young stated that Mr. Kin fell down the stairs on June 15, 2019. Or Medical records from Dr. Levy indicate that Mr. Kin is current on his shingle vaccination. His next vaccination is due 12/15/2021.	Client fell. Or John is current on shingles shot.
Avoid non-pertinent information	CM Long developed rapport with Kevin.	CM Long commented on Mr. High's Star Wars t-shirt. Mr. High explained that his favorite video game is Star Wars for the X-Box. He stated that he finished the 3 rd level last night and his best friend, Josh, finished the 5 th level. I told him I love X-Box too!
Focus on significant information	CM Nelson completed a face-to-face with the client on 4/13/2016.	CM Nelson arrived at the home of the client and knocked on the door. Mr. Lopez

		answered and invited CM in. CM sat on the couch and observed that there was a new painting of a sunset on the living room wall....
Do not document your own personal feelings or emotions	The Green family has a large dog. The family agreed to keep the dog gated or outside during home visits with CM.	CM Mitchell was nervous about the big dog in the home, but the dog was gated into the kitchen and did not come into the room with CM. CM Mitchell felt relieved when Mr. Green put the dog in the backyard.
Group similar information together when possible	During the family meeting, Ms. Smith, Mr. Smith, and Ms. Baker each expressed concerns about Mr. Parker's alcohol abuse issues.	During the family meeting, Ms. Smith stated that the client is a drunk. Mr. Smith stated he thought so too. Mr. Baker said he saw him drinking whiskey.
Use spell check! Double check spellings of names, medications, diagnoses, etc.	Dr. John Black is client's physician. Dr. Black confirmed that she prescribes Adderall and Clonazepam for client's needs.	Dr. John Blcak is client's physican. Dr. Black confirmed that she prescribes Aderall and Clonepam for client's needs.

10/22/2020

Modified for JFS In-service training