

Clear and effective recording of Notes

Sharing Information – why good quality recording is important

The [IO Insight](#) system is one view of the [IO Insight / Outreach](#) database and is the view used by Connexions PA's to record the work that they do with clients. The information that goes on to [IO Insight](#) can also be seen through the [IO Outreach](#) view and, therefore, can not only be viewed by Connexions PA's, but also by Youth Workers, Youth Work Managers, Administrators, YOT workers and other staff members working with young people within the IYSS. This information can often also be requested by outside agencies such as other Local Authorities (if the young person has moved out of the area), the Police (if there are safety concerns or criminal involvement) or in the most serious cases by Social Workers and Child Protection Officers (where a clients safety is at risk). Young people themselves can also request to see a copy of the information that goes on to [IO Insight](#) through the [Freedom of Information Act 2000](#) and indeed, the [Information Commissioners Office](#) is looking at ways to make it easier for people to access the information that we currently hold about them.

Every [History](#) record on [IO Insight](#) has the facility to add written [Notes](#).

Given that a very wide range of different people may access a record onto which you are entering information about a young person, it is of vital importance to ensure good recording practices. These notes may need to be used as evidence in Court or in case of emergency or just simply by a colleague picking up your caseload whilst you are away and so they need to be fit for purpose. Good recording practices are something that should have been covered during your professional training and also addressed through your organisations own supervision and appraisal procedures.

This document is intended to support those procedures, not replace them, and is intended to cover the basic and most obvious things to bear in mind when recording [Notes](#) on [IO Insight](#).

Use of Abbreviations

Within your own organisations, you may often use abbreviations for terms that are lengthy or difficult to spell. However, these tend to be unique to individual organisations and often, an abbreviation can mean one thing in one organisation and something completely different in another.

[Avoid](#) using abbreviations in text. You, and colleagues from your organisation may understand what '[ASS](#)' or '[FUP](#)' or '[SOG](#)' means but a colleague at another organisation may not.

If you wish to use an abbreviation or use it more than once in the text, make sure you explain what it means at least once in brackets beside it e.g. [ASS \(assessment\)](#).

In an emergency, colleagues may not have time to contact you to decipher what you have written and should the information have to be used in court, for example, the Judge and Barristers should be able to understand immediately to what you are referring so that there was no possible ambiguity.

Missing Information

When you are working with a client it can be easy to forget and to assume either that

- You are the only person who works with that client or
- That the other workers involved know everything you know about that client

Both of these assumptions are rarely the case. When you are recording the details of an interaction, make sure you include all information that might be relevant and necessary to other workers accessing the record.

For example,

'I called Sophie today and she said that Bob had been in touch to ask her if she could drop by and see him. She said he needs to see her urgently but she doesn't want to meet him. Bob had been in earlier today and was indeed trying to make contact with Sophie'

In this text we do not know who Bob is. Is he a boyfriend? A Social Worker? Should this be causing us concern about her welfare? Is contact with Bob important? How would anyone know who Bob was or where to contact him?

If we are going to reference other people in text, it is useful to include information about who they are, their relationship to the client and any contact information we have about them. This can be referenced in the text and supported with a record on the [Relations](#) tab. So, in our example the text should read:

'I called Sophie today and she said that Bob (Sophie's Social Worker – see Relations) had been in touch to ask her if she could drop by and see him. She said he needs to see her urgently but she doesn't want to meet him. Bob had been in earlier today and was indeed trying to make contact with Sophie'

We can now understand both the context of the information, as well as understanding Bob's relationship to the client and where on the system to find out further details about him.

[Don't make the assumption that people will 'know what I mean / know who I mean'.](#)

Make it clear and leave no room for doubt and include as much useful information as you can with indications on where to find more information if necessary. Don't forget to include where you saw the client and why you were contacting them.

Personal Opinion / Feelings

When you are recording the notes of an interaction, it can be very tempting to include your own opinions or feelings. A client might have been 'grumpy', or 'in a bad mood' and you may use this sort of language in the notes. However, this is not good practice. The [Data Protection Act 1988](#) states that the data that we record should be accurate and factual. Opinion is not accurate or factual because it is only one persons view of a situation. We need to state the facts of what happened.

For example:

'John came into the centre for his appointment but was sulky and we didn't make much progress'

What does this person mean by sulky? Why did this cause a problem? What would John say if he saw this on his notes?

This interaction would be better recorded as...

'John came into the centre for his appointment. He did not respond to the questions I asked of him and where I was able to get a response it was a one-word answer. This made the interview difficult and we didn't make much progress.'

Here we have clearly explained the behaviour John was exhibiting so that it cannot be mis-interpreted and it makes the context of the notes clearer – now we can understand why progress wasn't made. Should John see his notes, he would have difficulty challenging what we had written because it recorded what happened without attaching an opinion or a feeling to it.

Avoid using humour or anger as both can be misinterpreted by other readers or perceived as derogatory or insulting.

Relevance

Often we can come by information about a client from another source outside of the client. Whilst often this can be an invaluable exchange of information, the information that they give us needs to be treated with caution and common sense. Firstly we need to ascertain the reliability of the information and whether it is necessary for us to record it.

[If you are in any doubt, consult your Line Manager who can offer advice and discuss it with you before agreeing a decision.](#)

Again the [Data Protection Act 1998](#) states that the information we record should be relevant and accurate. So before we even put finger to keyboard, we need to make a professional judgement about what we include.

If we do decide to record it, we need to make it clear where the information came from. We also need to gain the permission of the person giving us the information to record it on [IO Insight](#). If they don't give permission, don't record it.

For example:

'Janet rang and said Emma was pregnant again and that Social Services will probably be involved again due to current circumstances'

Who is Janet? Is Janet a reliable source? What does this mean? The extract above doesn't tell us how Janet knows Emma is pregnant, what 'current circumstances' are or what Social Services involvement is. Whereas in this extract:

'Janet (Midwife from Pudsey Surgery – see Relations) rang to confirm that she had performed a pregnancy test with Emma, the result being positive. Janet had contacted Social Services who took details due to child protection concerns (see Safeguarding History).'

...we can clearly see that Janet is a trusted healthcare professional; we can see that Janet's information is based on a medical procedure, what Social Services involvement was and why Janet had involved them. This information can also be followed up and traced back, should the need arise, and in case the information is disputed.

Slang

It goes without saying that you should use everyday Standard English and that slang / colloquial phrases should not be used. Again, this is because different terms can have different interpretations in different areas and because the notes you record may be used in a Court of Law or as evidence and need to be clear to everyone who may read them.

Spelling and Grammar

Good spelling and grammar convey a professional impression of the work you are undertaking. Not everyone is naturally good at spelling and grammar; however, there are tools available to use to improve these skills. Spell checkers, where available, should be utilised, although it also helps to proof read something in addition in case the spell checker has missed something. Similar sounding words can often be missed by spell-checkers e.g. depraved / deprived and they can often have very different meanings. Keeping sentence length down will reduce the need for complicated grammar. It will also make it easier for another worker to read and understand the record quickly.

Purpose

When writing notes about a client on a record, it is helpful to consider the purpose of the notes. What is it that we are wanting to record and why. There is a balance to be achieved between including too much irrelevant information that could stop a colleague from being able to locate the important facts quickly and not including enough

information that leads to problems in working out what happened. Think carefully before you write: ensure that you include everything you think someone else would need to know and not simply what would just be enough to jog your memory.

Professionalism

When writing notes on a client record, bear in mind that these are your professional recordings. Whether case notes are gathered on paper or by electronic systems makes no difference to the quality and accuracy of what you record. You may be called to explain what you have written to other professionals, possibly even in a legal situation. Would you be happy to have them read out in front of a Judge, for example? Other PA's are also going to read the notes and these notes may be the only link they have to you and your organisation. What would these notes say about you, as a professional and about the attitude and ethos of your organisation?

Remember: poor communication, either by letters, emails or on computerised systems gives an un-professional impression of both you as the practitioner and of your organisation.

Where to find further information and resources

This website is from the National Career Development Association and has some good, commonsense casenote writing tips and hints.

http://www.associationdatabase.com/aws/NCDA/pt/sd/news_article/5443/_PARENT/layout_details/false

This is a link to a document put together by Aberdeen City Council in association with Robert Gordon University. It is intended for use by Social Workers but much of the advice is still relevant to PA's writing case notes.

http://data.learningnetworks.org.uk/news/332/Professional_Writing_Guidance_Booklet_Edition_2.pdf

This website has a training resource available around recording information effectively for those people working in Children's Services. It was commissioned by the Department of Education and Skills.

http://www.writeenough.org.uk/recording_skills.htm

This website tells you about the Freedom of Information Act and what is expected of an organisation

http://www.ico.gov.uk/for_organisations/freedom_of_information.aspx

This website covers the Data Protection Act 1998 and the 8 Data Protection Principles that you should be following when you record information on IO Insight.

<http://www.legislation.gov.uk/ukpga/1998/29/contents>

Remember – this mini guide is NOT an exhaustive guide to producing good quality records on IO Insight. Your manager should provide the first line of support and feedback on the information you record either manually or on a computerised system.