

## Documentation Skills for the Disability Services Sector

*(Adapted from Tutor Tips: Documentation Skills in Aged Care – Progress Notes. Published by the Queensland Department of Employment, Economic Development and Innovation)*

Each individual receiving support from Cara must have a Personal Support Plan (PSP) in place to ensure ongoing care needs are met. Information recorded in PSPs and development plans helps accommodate changes in the needs of the individual with a disability. Forms you complete and information you record about individuals you support can also become legal documents in the case of complaints, claims for damages and injury or death to individual you support, yourself or another worker.

### General information about documenting:

- Needs to be completed according to Cara policy and procedures
- Needs to be completed as soon as possible, especially if there has been a change, an event or an incident
- Should:
  - Be objective (not include opinion)
  - Be concise
  - Use appropriate language
  - Include only necessary information
- Where documentation is handwritten (or printed):
  - Black ink must be used
  - Correction fluid or tape (whiteout) cannot be used
  - Where changes must be made, a line must be drawn through any corrections, the correction initialed and the information rewritten
  - A line must be drawn where documenting does not use all the space available
  - All notes must be dated (and time recorded if it regards an incident)
  - All notes must be signed and include the compiler's name and job role (eg: J Thomas, CSW)
- Use correct English language without slang (unless directly quoting another person)

### Sentence Structure for appropriate documentation (concise and business-like):

Common Phrases	Alternative Words
Kept an eye on/watched over	Monitored, observed, supervised
Put the client's legs/arms up	Raised, elevated
Make the swelling go down	Reduce, decrease, alleviate
Kept on/over and over again	Continually, constantly, persistently
All the time/ a lot	Frequently, often, continually, constantly
Take off	Remove
Every now and again	Continuously, often, frequently
Looks the same as	Resembles
Spoke too quietly to be heard	Inaudible
Singing one moment then swearing the next	Alternately swinging and swearing
Going on about	Complaining
Pulls faces	Grimaces

Using active rather than passive voice helps make the message clear and keeps the documentation concise. For example:

Active voice	Passive voice
Mrs Lee refused dinner	Dinner was refused by Mrs Lee
The RN changed Mr Ford's bandage	Mr Ford's bandage was changed by the RN
Staff assisted Ms Free to dress	Ms Free was assisted to dress by staff
Staff heard Mrs Ray call out	Mrs Ray was heard to call out by staff.

### Structuring the information you record

The 5W+How? plan is a good one to follow to ensure all the necessary information is included in documentation:

**Who** – who is it about?

**Where** – where did it happen?

**When** – when did it happen?

**What** – what happened?

**Why** – why did it happen?

**How?** – only include this if there is direct evidence such as you seeing an event or incident.

You may wish to include a 6<sup>th</sup> W – **What** you did about it (if needed/appropriate), in the form of a procedure.

### The Seven Cs of Clear Writing:

<b>Be:</b>	
Clear	<b>...about your purpose:</b> Why are you writing? What result do you want? <b>...about your message.</b> What precisely do you want to say?
Concise	<b>Get rid of unnecessary words and information:</b> Find the shortest most direct way to state your message <b>Use Plain English:</b> Be straightforward and direct.
Complete	<b>Include all necessary information:</b> give enough background to help the reader make sense <b>Don't assume the reader knows:</b> Avoid jargon, initials (unless instructed) or use specialist language and terminology
Correct	<b>Get grammar and punctuation right:</b> grammar and punctuation make writing make sense <b>Make sure your information is accurate:</b> Just one thing wrong can undermine the credibility of you and Cara
Concrete	<b>Give specific information:</b> Detail the 5 W's <b>Avoid abstract or vague language:</b> give examples
Coherent	<b>Organise your ideas logically:</b> Ensure conclusions are supported by evidence <b>Use formats and structure:</b> Use clear sequence and easy-to-follow layout
Courteous	<b>Put yourself in the reader's shoes:</b> Who are they? What matters to them? <b>Use appropriate tone:</b> How do you want them to think of and respond to you?

If in doubt, create a draft copy of your documentation and when you are satisfied that it meets all of Cara's needs, destroy the draft according to Privacy and Confidentiality policies and procedures.