

Purpose

Documentation records important details about the services and supports provided to children and families. Make clear notes to accurately capture services and supports so that they are understood by the reader.

How to Document

General Guidelines

Documentation notes should always include:

1. Date of the note
2. Type of contact
3. Name/initials of staff member
4. Brief summary of contact and next action/follow up
 - Who did you speak with?
 - What happened? What is due next or what follow up action is needed? What service/support did you provide?
 - When are actions due? When did you speak with the family?
 - Where did the contact occur?
5. When referring to children and families, do not use any personally identifiable information. Instead, use “child,” “parent/guardian,” or child ID numbers from ChildPlus or ELMS.



Documentation notes are public record. PSESD Coaches, PSESD Monitors, and funders [i.e. Office of Head Start (OHS), Department of Children, Youth, and Families (DCYF)] may review your notes, and all documentation is subject to subpoena.

Timeliness

Update notes frequently and promptly. Document the contact within 1-2 business days while the information is fresh in your mind. Timely entries allow staff to support progress and coordinate interdisciplinary support when needed.

Professionalism

1. Use a black or blue pen on all forms.
2. Use correct grammar and punctuation.
3. Avoid using slang, metaphors, or similes.
4. Leave out language that conveys opinions or judgement.
5. Write clearly and concisely, yet enough so that you or another staff member can understand what happened and what plans were made. Use bullet points as necessary.

Writing Recommendations

1. Write in a style that is factual, unbiased, specific, clear, and to the point.
2. Make entries in the third person, e.g. "Parent stated...", "FSS provided...", etc. instead of he, she, they, or I.
3. Avoid using "said" or "was" and use qualifiers. See chart below:

| Suggested Verbs to Use | | | |
|------------------------|------------|-------------|------------|
| Advised | Connected | Focused | Referred |
| Agreed | Consulted | Identified | Reflected |
| Assessed | Discussed | Partnered | Suggested |
| Assisted | Directed | Planned | Summarized |
| Clarified | Encouraged | Provided | Supported |
| Communicated | Enhanced | Recommended | Urged |

HS


EHS

EHS-HB

All documentation must be written on the [Family Contact Log](#) and supporting forms.

ECEAP

How to Print Documentation from ELMS

 **ERSEA documentation must be written on the [Family Contact Log](#) until the family has attended their enrollment visit.** All other documentation from that point forward must be entered in ELMS.

Click on "Reports" Tab



Click "Child" Tab



Click "Child Record Summary"



Enter Child ID



Save PDF



Click "Run Report"

Documentation Protocols

HS

EHS

EHS-HB

Sample Documentation – [Family Contact Log](#)

Child/Family Name: Jordan Wong

| Date | Type of Contact | Focus Area | Summary | Staff Initials |
|--|-----------------|---|--|----------------|
| 3/15/18 | CC | - | Grandma came into center to ask about HS program. FSS-CB shared information about program and gave grandma application. Grandma completed application and will return Monday with eligibility documents. | CB |
| 3/20/18 | TC | - | FSS-KB called and spoke with dad about child's application and missing documentation. Dad shared he is available tomorrow for application review and will bring documents. | KB |
| 3/21/18 | CC | - | FSS-AB reviewed application with family in-person at site. During interview, FF-NJ verified age, income, and verified household size. See EVF for documents used to verify eligibility. Dad also shared that child and sibling live Sunday, Monday, Tuesday and Wednesday with Dad and Thursday, Friday, Saturday with Mom. FSS-AB spoke with dad about importance of attendance. Dad shared that Mom is also interested and committed to program. Mom's contact information is attached to application. | AB |
| 4/03/18 | TC | - | FSS-LB called family to verify interest in program. Dad shared that he is still interested and will remain on WL. Dad also shared that he has moved and updated his address. Same living situation for child between Dad and Mom household. | LB |
| 4/28/18 | TC | - | FSS-LJ called family to offer spot in HS program in Classroom A. Dad shared that he is still interested and scheduled an Enrollment Visit on 5/1/18 at 9 AM at the site. | LJ |
| 5/1/18 | CC | 2, 7 | FSS-CP met with family at the site to complete enrollment documentation. FSS-CP completed Family Connections packet with Dad, reviewed Our Agreements, Safe Arrival and Departure Agreement and reviewed Goals, Needs and Interests. Dad shared that he is interested in Peer Programs, Fun Family Activities, and Family School Readiness. Dad also shared that he has a need for child care resources. He would like to find a closer child care since they have moved to a new location. FSS-CP provided Dad with child care information in new community. Dad shared that he will call child care next week to find out more information. Dad also shared that he has been trying to focus on applying to UW- nursing program. | CP |
| 5/16/18 | TC | - | FSS-CP called to follow up on focus area 2 & 7. No response, left message on Dad's cell. | CP |
| 5/17/18 | TC | 2,7 | Dad called FSS-CP back - followed up with dad regarding child care and applying to UW. Dad shared that he is transferring children to childcare down the street from his house next week. No longer a need identified by family. He also finished his application to UW and will hear back about acceptance around June 15 th . | CP |
| Codes: Type of Contact | | | Codes: Focus Areas | |
| IO = Information Only TC = Telephone Call CC = Center Contact HV = Home Visit N = Note E = Email TM = Text Message | | F = Fax COL = Collateral Contact A = Attendance IDS = Interdisciplinary Staffing T = Transition | 1 = Family Stability – Housing 2 = Family Stability – Family & Dependents 3 = Well-Being – Health & Mental Health 4 = Well-Being – Personal & Professional Networks 5 = Financial – Debt 6 = Financial – Savings 7 = Education & Training 8 = Employment & Career Management 9 = Other | |

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Sample Documentation – [Family Contact Log](#)


Child/Family Name: Gabe Wong

| Date | Type of Contact | Focus Area | Summary | Staff Initials |
|---------|-----------------|------------|--|----------------|
| 3/15/18 | CC | - | Grandma came into center to ask about HS program. FSS-CB shared information about program and gave grandma application. Grandma completed application and will return Monday with eligibility documents. | CB |
| 3/20/18 | TC | - | FSS-KB called and spoke with dad about child’s application and missing documentation. Dad shared he is available tomorrow for application review and will bring documents. | KB |
| 3/21/18 | CC | - | FSS-AB reviewed application with family in-person at site. During interview, FF-NJ verified age, income, and verified household size. See EVF for documents used to verify eligibility. Dad also shared that child and sibling live Sunday, Monday, Tuesday and Wednesday with Dad and Thursday, Friday, Saturday with Mom. FSS-AB spoke with dad about importance of attendance. Dad shared that Mom is also interested and committed to program. Mom’s contact information is attached to application. | AB |
| 4/03/18 | TC | - | FSS-LB called family to verify interest in program. Dad shared that he is still interested and will remain on WL. Dad also shared that he has moved and updated his address. Same living situation for child between Dad and Mom household. | LB |
| 4/28/18 | TC | - | FSS-LJ called family to offer spot in HS program in Classroom A. Dad shared that he is still interested and scheduled an Enrollment Visit on 5/1/18 at 9 AM at the site. | LJ |
| 5/1/18 | CC | 2, 7 | FSS-CP met with family at the site to complete enrollment documentation. Please see details in ELMS and refer to ELMS for all future documentation. | CP |
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| Codes: Type of Contact | | Codes: Focus Areas | |
|------------------------|----------------------------------|---|------------------------------------|
| IO = Information Only | F = Fax | 1 = Family Stability – Housing | 5 = Financial – Debt |
| TC = Telephone Call | COL = Collateral Contact | 2 = Family Stability – Family & Dependents | 6 = Financial – Savings |
| CC = Center Contact | A = Attendance | 3 = Well-Being – Health & Mental Health | 7 = Education & Training |
| HV = Home Visit | IDS = Interdisciplinary Staffing | 4 = Well-Being – Personal & Professional Networks | 8 = Employment & Career Management |
| N = Note | T = Transition | | 9 = Other |
| E = Email | | | |
| TM = Text Message | | | |

ECEAP







Sample Documentation – ELMS

Date: 

Staff Member Name:

Are you recording a formal family support visit of 30 minutes or more? Yes No







Notes:

B I |  |  |  |  |  |  | ?

Contact - CC, Focus Area - 2,7

FSS-CP met with family at the site to complete enrollment documentation. FSS-CP completed Family Connections packet with Dad, reviewed Our Agreements, Safe Arrival and Departure Agreement and reviewed Goals, Needs and Interests. Dad shared that he is interested in Peer Programs, Fun Family Activities, and Family School Readiness. Dad also shared that he has a need for child care resources. He would like to find a closer child care since they have moved to a new location. FSS-CP provided Dad with child care information in new community. |

Follow-Up Plans:

B I |  |  |  |  |  |  | ?

Dad shared that he will call child care next week to find out more information. Dad also shared that he has been trying to focus on applying to the nursing program at UW.