

Documentation Protocols

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.

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

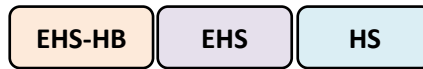
1. Use a black or blue pen on all forms.
2. Use correct grammar and punctuation.
3. Avoid using slang, metaphors, or similes.
4. Leave out language that conveys opinions or judgement.
5. Write clearly and concisely, yet enough so that you or another staff member can understand what happened and what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

Writing Recommendations

1. Write in a style that is factual, objective/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 on the next page.

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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



All documentation must be written/typed on the *Family Contact Log* and supporting forms.



Documentation notes are public record. Coaches, Monitors (Technical Assistance Coordinators), and funders may review your notes, and all documentation is subject to subpoena.

ECEAP How to Print Documentation from ELMS

! ERSEA documentation must be documented on the *Family Contact Log* until the family has attended their enrollment visit. All other documentation from that point must be entered in ELMS.

