How to write case notes

Creating useful, accurate and dependable records

PeakCare
Queensland Inc.

About QCOSS

We are QCOSS (Queensland Council of Social Service), Queensland's peak body for the social service sector. Our vision is to achieve equality, opportunity and wellbeing for every person, in every community.

We believe that every person in Queensland – regardless of where they come from, who they pray to, their gender, who they love, how or where they live – deserves to live a life of equality, opportunity and wellbeing.

We are a conduit for change. We bring people together to help solve the big social issues faced by people in Queensland, building strength in numbers to amplify our voice.

We're committed to self-determination and opportunity for Aboriginal and Torres Strait Islander people.

QCOSS is part of the national network of Councils of Social Service lending support and gaining essential insight to national and other state issues. QCOSS is supported by the vice-regal patronage of Her Excellency the Honourable Dr Jeannette Young AC PSM, Governor of Queensland.

Join us to mobilise a force for equality, opportunity and wellbeing.
To join visit the QCOSS website (www.QCOSS.org.au).

QCOSS acknowledges Aboriginal and Torres Strait Islander people as the original inhabitants of Australia and recognises these unique cultures as part of the cultural heritage of all Australians. We pay respect to the Elders of this land; past and present.

Contents

Introduction

QCOSS' conversations with organisations often highlight skill gaps and opportunities for improvement across the sector. Throughout 2020, case note writing skills began to emerge as a practice skill that needed further support. QCOSS sought to work with PeakCare to deliver a case note writing workshop in Brisbane in 2022.

This guide has been written utilising the workshop content developed by Lindsay Wegener, a respected social worker with over 35 years of experience working in child protection and youth justice. Lindsay knows firsthand how impactful good case note writing skills can be, and how they can change the trajectory of someone's life.

Good case note writing skills are underpinned by critical reflection. Those authoring case notes should be supported by robust professional supervision and opportunities to refine their reflective practice skills. Similarly, those reading the case note of others should be aware of how bias may make its way into their case notes.

Case notes are integral to case management and many forms of social work. Case note writing can be a tedious task, but case notes form the basis of decision making and planning - their importance cannot be underestimated.

Case notes help to inform new plans of action, assist new workers and contributing professionals to better understand an individual's history, and assist in identifying patterns. Sometimes, they will be used in court proceedings as evidence. In many cases, the information contained within case notes have made a significant difference to an individual's life.

The introduction of the *Human Rights Act 2019 (Qld)* has meant many organisations delivering community services have had to reflect on the way in which they evidence that proper consideration of human rights has been followed, and this has been a great prompt for all who write case notes to reflect on record keeping practices and how we utilise records across the sector.

It is essential that those authoring case notes have a robust understanding of the purpose of their case notes, and form good habits around case note writing, including:

- factoring in time for writing case notes regularly
- reflecting on possible bias
- following organisational policy on record keeping
- checking case notes for accuracy
- keeping case notes brief, accurate and able to easily understood by others.

This guide provides an overview of how to write case notes that are accurate and authentic, strengths-based and that comply with legislative requirements. While this resource contains helpful content, it should not be used as your only source of professional development on writing case notes.

What is a case note?

A case note is a written record of information about a client and their case. Each organisation has its own way of recording case notes, however, usually, case notes are recorded about the individuals and/or families who are the recipients of your organisation's services.

The people within an organisation who record case notes may include designated caseworkers or person/s with designated direct care or support roles, intake officers, administration and/or auxiliary staff.

Organisations may use "electronic" or "manual" systems for entering, storing and accessing recorded case notes. It is important that you and all who work within your organisation know your organisation's case note policies and procedures.

Case notes have both a static and dynamic purpose.

Static case notes

The **static purpose** of a case note is to record information to maintain a clear and accurate historical record of case details, events, decisions made and/or actions taken for various administrative, professional and agency reporting purposes.

Record-keeping practices must be able to demonstrate **evidential integrity** in respect of both their *accuracy* and *authenticity*. A record with evidential integrity is more likely to be treated as credible and reliable in a court of law.

An accurate record is one that can be:

- trusted as a true representation of decisions, activities or facts, and
- depended on in the course of subsequent decisions or activities.

An authentic record is one that can be:

- proven to be what it claims to be, and
- referenced to the person who created or transmitted it.

Case notes are corporate records. As such they:

- belong to your organisation (and not individuals)
- must only be used for official purposes of your organisation
- should only be accessed by staff who require this access to fulfil their duties
- must be treated as confidential
- must be retained for as long as required under your organisation's retention and disposal schedule, and
- must only be destroyed in a secure manner.

Most organisations' record keeping policies state that, as corporate records, case notes must demonstrate evidential integrity by:

- incorporating a level of documentation sufficient to provide evidence of the organisation's actions and decision-making processes
- remain complete and unaltered (if information that is recorded is found to be inaccurate, incomplete or misleading, a new dated record should be made correcting the error)
- to demonstrate evidential integrity in respect of both accuracy and authenticity, records should be completed as soon as possible following the information being received. **An activity is not completed until a documented record of the activity is completed.**

Dynamic case notes

The **dynamic purpose** of a case note is to efficiently and effectively collect, organise and convey information about a client between parties to assist with service management, coordination and delivery. Dynamic information may include:

- the assessment/re-assessment of a client's strengths and needs
- the monitoring of progress and/or changes in a client's circumstances or needs, and
- decision-making and planning. What is a "good" case note, and why does it matter?

In this section you will learn what a good case note is and why it matters. You will learn how to write from a strengths-based perspective, and you will step through the Data, Assessment, Plan (DAP) Framework, a simple way to write accurate, authentic case notes.

What is a "good" case note?

A good case note accurately describes an individual or family's experience in relation to the issues of concern which prompted their referral or approach to your organisation.

It defines the matters which are important to their short- or long-term care and/or support, and it maintains an account of the decisions made and the actions taken in relation to their lives. Importantly, it provides opportunities for the client or clients to collaborate and participate in this decision-making process, by reflecting with supportive professionals on accurately recorded incidences and patterns.

A good case note is one that not only contains the correct content, but considers how the information is framed, worded and used. For this reason, it is important to consider what you write in your case notes, how you write your case notes and what messages they might convey.

Strengths-based case notes

Using a strengths-based approach to writing can help you actively commit to recording information that is accurate and complete. Accurate case notes provide a true and specific account of events, decisions or actions that are taken or planned. They recognise that truth may sometimes be based on perception.

The strengths-based case note writing approach requires that information is recorded in ways that promote open and ongoing enquiry and the ***possibility of hope.*** It recognises that, in many instances, those who seek out, come to the attention of, or are referred to your organisation for a service, will already hold perceptions of themselves as dysfunctional or inadequate and be experiencing a sense of hopelessness and despair.

Strengths-based case note writing does not confirm or exacerbate the negative perceptions a person might have about themselves. Instead, it introduces them to the possibility of hope through open and ongoing enquiry about, and discovery of, their unique strengths and resilience.

Use of a strengths-based approach requires that information is not recorded or presented in a way that further labels individuals as failures or inadequate or confirms their own thoughts about this. It also requires information to be framed and presented in ways that reflect the writer as someone who is standing with the person and standing against the issues of concern that are impacting their life.

Examples of deficit- and strengths-based case notes

To understand how powerful framing can be, below are examples of a deficit-based and strengths-based case note about the same person.

Deficit-based case note

Mary Bloggs is an incompetent and inadequate recorder of case notes. She is inadequate in terms of her knowledge, skills, and experience in being able to record case notes properly.

Strengths-based case note

Mary Bloggs is experiencing difficulties in recording case notes. With only a few months experience and having not yet received all the information and training Mary needs to gain knowledge about recording case notes, this is currently getting in the way of Mary being able to build her skills and demonstrate all of the competencies required for this area of her work.

While the deficit-based case note presents Mary's issues of concern as symptomatic and confirmation of her personal incompetence and inadequacy, the strengths-based case notes frames Mary and the writer as standing together against the issues of concern. The reader's perception of Mary after reading the strengths-based case note is framed in a way that identifies opportunity for bolstering points of strength. The case note identifies tangible issues to be addressed rather than discounting any hope that Mary can change.

Strengths-based case note writing dos and don'ts:

- do use respectful language
- don't use value-laden, judgemental conclusions and expressions of personal opinion
- do provide clear descriptions
- do use key terminology appropriately
- do be aware of distinctions between "swearing" and "abusive" language
- do take custom and context into account
- do think beyond the "words you hear" to a position of "actively listening" to the intentions and "real meaning" of words
- don't quote swear words if they "confuse" rather than "clarify" and misrepresent the person quoted
- do be aware that quotes may become subject to value-laden, personalised interpretations by the reader
- do write clearly– avoid non-specific or misleading words and phrases
- don't use abbreviations and "text-message" spelling
- don't use an acronym without first ensuring that the full title has appeared followed by the acronym in brackets
- do show the reader rather than tell them the information you are trying to communicate.

Examples of how to write in a way that shows, not tells

"Chris was obviously angry" goes only part of the way towards providing a clear description.
It may "tell" the reader some information about Chris, but it doesn't "show" the reader in what ways it was made obvious that Chris was angry. A better and clearer description (such as "Chris appeared angry, evidenced by his raised voice and behaviour in pacing up and down the interview room") both tells and shows the reader the relevant information.

Making effective use of the term "appears" to describe those things that were observable to you (e.g. "Chris appeared restless").

Use "seems" to describe impressions that you formed based on cumulative information (e.g. "Chris seems like a highly intelligent young man").

Qualifying comments frequently follow observations that reflect the worker's impressions, showing that the worker is not sure but suspects something might be true. (e.g. "Chris hesitated to answer, which could indicate he wasn't certain.").

The D.A.P Framework

There are multiple case note writing frameworks which can guide how you approach and write case notes and your organisation may have a preferred methodology. Here, we will unpack the D.A.P Framework.

The Data, Assessment, Plan (D.A.P) framework is a simple, easy-to-remember tool for recording accurate and authentic case notes. Below are explanations of what is meant by each term and questions that will help you gather useful, accurate content.

Data

Data may be both subjective (what the person says or feels) and objective (observable behaviour). The following questions are useful to answer when gathering data.

- what did the person say or do during the contact?
- what did you observe?
- what happened?
- where did it happen?
- when did it happen?
- what was the order of events?
- who was involved?

Assessment

Assessment allows for the formulation of some working hypotheses and interventions where required. To assess someone accurately, you may ask the following questions:

- what appears to be going on?
- what is their emotional/physical state?
- what was a course of action decided or recommended?

Plan

A plan outlines the responses to be made to the situation. The following questions are useful when deciding on a plan:

- what will be done, by whom and when?
- what was decided or recommended?
- what actions were carried out?
- what instruction was given?
- who approved the action or recommendation?

The D.A.P Framework (a sample template)

Name of Client	
Date of interaction	
Time of interaction	
Type of interaction	Specify the mode of communication - face to face meeting, phone, Teams or Zoom meeting, text based chat etc
General Topic	
BACKGROUND	Background to case note
DETAILS (This is where you record **Data and Assessment**)	Contact note details including: ▪ what happened? ▪ where did it happen? ▪ what was the order of events? ▪ who was involved? ▪ what is your assessment of what's going on? (substantiated) ▪ what conversation has been had about a course of action or response?
OUTCOMES (This is where you record your **Plan**)	Action required ▪ what further action is required? ▪ why was a course of action decided on or recommended? ▪ who approved the action or decision?
Action to be completed by:	Name/s of those to carry out the actions
Due:	Date by when the actions are to be completed

Name (Author of case note)

Position title

Location

Case note legal requirements

Case notes may be subject to a range of legislative processes and requirements during and following the conclusion of your professional relationship with a client. The nature of these requirements may differ according to the state in which your practice is based and the nature or context of your practice. Statutory bodies, for example, are subject to Freedom of Information legislation, which may differ slightly from state to state. Notes can be subpoenaed for many reasons. Processes for responding to a subpoena can depend on the court and your organisation's policies and procedures.

For these reasons it is important for practitioners with case note or documentation responsibilities to:

- be familiar with the specific legal requirements and processes that can impact on their practice
- consider the implications of federal and state legislation when recording case notes
- understand how these requirements are implemented within their organisation (where relevant)
- understand what policies and procedures may need to be implemented when working in private practice.

The Minister of the State Government, government departments, local governments and public authorities are agencies legally required to keep case notes under the following Acts:

- Privacy Act 1988 (Commonwealth)
- Right to Information Act 2009 (Qld)
- Information Privacy Act 2009 (Qld)
- Public Records Act 2002 (Qld) and Public Records Regulation 2004 (Qld)
- Child Protection Act 1999 (Qld)

Under Section 35 of the *Information Privacy Act 2009,* if you are a service provider who enters into a service agreement with an agency, then you are required to comply with legislated requirements relating to the collection and management of personal information "as if you were the agency". This means that:

- the nature of the personal information that is collected and recorded within case notes must directly relate to the activities and functions of the organisation and this information and can only be collected in ways that are fair and lawful
- the information collected and recorded in case notes must only be used for the purposes for which it was collected
- the information recorded within case notes cannot be disclosed to others without the consent of the person about whom the information relates, unless disclosure of the information without the person's consent is permitted by law or is necessary to prevent imminent threat to health or life
- all reasonable steps must be taken to ensure that the information is accurate, up-to-date, relevant and complete
- all reasonable steps must be taken to ensure that the information recorded as a case note is stored safely and securely
- persons about whom information is being collected and recorded within a case note should be informed about the purpose for collecting and recording this information and to whom this information may be disclosed
- a practitioner's obligation to hand over case notes in response to a subpoena varies from state to state, and may also depend on the subpoena itself. Keeping case notes that are useful but sparse can help you balance your client's privacy needs with treatment goals in the event that you are legally required to hand them over.

Reflecting on a case note

The following four exercises ask you to reflect on the below case note including what's good and what could be better about it, whether it fulfills its static and dynamic purpose, and whether it displays evidential integrity. Finally, it asks you to rewrite it using the D.A.P framework.

Wednesday 3pm 05/07/22

- Spoke with Mrs Brown.
- She's upset and not coping because of Janine's b/f and Janine's behaviour
- Her language was bad.
- It looks like Janine might have to leave because of it.
- Janine's boyfriend is a fair-skinned aboriginal and there is racism.
- Something needs to be done to support her and negotiate some ground rules. (I think that Melanie has been slack with this!)
- Told Mrs Brown that I'd talk with Melanie about it (which I did at 4pm) even though Janine didn't want me to
- Janine isn't in anyone's good books, she feels low and needs some help.
- This person is a problem!

Reflection exercise one: Your examination of a case note

Write down what you think is good about this case note and what could be better.

What do you think is good?	What do you think could be better?

Reflection exercise two: Re-examining the sample case note

Think about the dual "static" and "dynamic" purposes of case note recording.

After considering the following questions about how well the sample case note serves firstly, as an "historical record" and secondly, as a form of "written communication", add to the lists you have generated about "what's good" and "what could be better" about the sample case note.

Questions to consider about the sample case note

As an historical record…

- how well does the sample case note serve as an accurate record of case details, events, decisions and/or actions taken or yet to be taken in regard to Janine and/or her family?
- in what ways could the sample case note be changed to better serve this purpose?
- do you think that, as an historical record, the sample case note will survive the "test of time" and serve as a useful reference for Janine, her family and/or others in the future?

As a form of written communication…

- in what ways would you see the sample case note as having been effective in collecting, presenting, organising and conveying information to you, the reader?
- in what ways do you think the information could have been more effectively collected, presented, organised and conveyed to you or others?
- thinking about the role you perform, how well would this case note have assisted you (and/or others) in:
  - assessing/re-assessing the strengths and needs of Janine and her family, and/or
  - informing your decision-making and planning (or the decision-making and planning of others) in respect of Janine and her family?
- in what ways would the sample case note positively contribute to your performance of each of the above tasks?
- in what ways could the sample note be changed to make an enhanced contribution to your performance of these tasks?

Reflection exercise three: Re-examining the sample case note (again)

Think about relevant privacy legislation, the concept of "evidential integrity" and the requirements of case notes constituting a "corporate record". After considering the following questions, add to the lists you have generated about "what's good" and "what could be better" about the sample case note.

Questions for you to consider about the sample case note

1. In keeping with relevant privacy legislation:

How well does the sample case note appear to have observed 'privacy principles" in relation to:

- only collecting personal information that is directly related to the activities and functions of your organisation and collecting it in a manner that is fair and lawful?
- making use of the information only for the purposes for which it was collected?
- not disclosing the information to others without consent or unless permitted by law or in order to prevent imminent threat to health or life?
- taking reasonable steps to ensure that the information collected is accurate, up-to-date, relevant and complete?
- taking reasonable steps to ensure that the information is stored safely and securely?
- informing persons in respect of whom the information is collected about the purpose for doing so and to whom the information may be.

2. In keeping with the concept of "evidential integrity":

How well does the sample case note serve as an *accurate record* of the activities, decisions and/or actions of your organisation? In particular:

- how well could the sample case note be **trusted as a true representation of decisions, activities or facts**?
- how well could it be **depended on in the course of subsequent decisions or activities**?

Are there other ways in which the case note could have been produced to better establish itself as an **accurate record** of the activities, decisions and/or actions of your organisation?

How well does the sample case note serve as an **authentic record** of the activities, decisions and/or actions of your organisation? In particular:

- can the sample case note be **proven to be what it claims to be**?
- can it be **referenced to the person who created it**?
- are there other ways in which the case note could have been produced to better establish itself as an **authentic record** of the activities, decisions and/or actions of your organisation?

In keeping with the requirements of constituting a "corporate record":

How well does the sample case note serve as a corporate record, remembering that as a corporate record it:

- belongs to the organisation (and not the individual who authored it)
- must only be used for official purposes by the organisation
- should only be accessed by staff who require this access to fulfill their duties
- must be treated as confidential
- must be retained for as long as required under the organisation's retention and disposal schedule, and
- must only be destroyed in a secure manner.

Reflection exercise four: Your turn to make it better!

Making use of all the information you have received including the notes you have recorded about "What's good?" and "What could be better?", write your own version of the case note.

Helpful information for how to do this is contained within the pages following this one.

Your version of the sample case note

Making use of the DAP framework

In keeping with the DAP. framework, check that your version of the case note has been organised in a way which allows for information to be presented relevant to the following:

Data

Does your case note present relevant data? (For example, does it include information about what you heard and/ or observed in relation to what was said or done?)

This “data” may be either subjective (what the person said or felt) or objective (observable behaviour) in relation to the person and/ or their family, their progress and current state or circumstances.

Does the type and amount of information included within your case note allow the following questions to be answered:

- *what happened?*
- *where did it happen?*
- *when did it happen?*
- *what was the order of events?*
- *who was involved?*

Assessment

Does your case note record your assessment about what appears to be going on? (For example, if relevant, does your case note incorporate your assessment of the person’s emotional or physical state and/ or your assessment of the impact of the issues of concern currently being experienced by the person and/ or their family?)

Does your case note incorporate information that allows for, where possible, the formulation of some working hypotheses and, where required, the rationale for any interventions that may be required?

Does the type and amount of information included within your case note allow the following questions to be answered:

- *what was decided or recommended?*
- *what actions were carried out?*
- *what instruction was given?*
- *who approved the action or recommendation?*

Plan

Does your case note describe responses that were made or are to be made to the situation? (For example, does it include information about what was done or will be done, by whom and when?)

Does the type and amount of information included within your case note allow the following question to be answered:

- *why was a course of action decided on or recommended?*

Providing a clear description

Check that your version of the case note provides a clear description of the information you are seeking to communicate. In particular:

- does your version of the case note contain any non-specific or potentially mis-leading words or phrases?
- when reading the original version of the case note, what assumptions did you make (if any) about the identity of Melanie?
- what may have led you to make this assumption?
- are you aware whether or not others who read the original version of the case note made the same or a different assumption about who Melanie is?
- what assumption (if any) did you make about the day on which Melanie was spoken to by the author of the original case note? (The original case note states that Melanie was spoken with at 4pm, but does not state the date on which this occurred.)
- depending on whether you assumed that this was on the same day, a previous day or a day following the date of the interaction that was being reported on within the case note (i.e. 3pm Monday 05.12.10), what sense did you make of the sequence of events and discussions that occurred?
- would your understandings about the sequence of events and discussions, as well as the significance of these events and discussions, be altered by a different assumption having being made about the date on which the discussion with Melanie occurred?
- what assumptions (if any) did you make about the identity of the person referred to as "a problem" at the conclusion of the original version of the problem note – did you assume that it was Mrs Brown, Janine or perhaps, Melanie who was being referred to?
- what may have led you to make this assumption?
- are you aware whether or not others who read the original version of the case note made the same or a different assumption about the identity of the person who is "a problem"?
- would your understandings about the information provided within the original version of the case note be altered by a different assumption having being made about the identity of the person who is "a problem"?

For the purposes of re-writing the case note, please ensure that you:

- assign an identity to Melanie
- determine a date on which the discussion with Melanie occurred, and
- clarify the identity of the person referred to as "a problem".

In addition, for purposes of ensuring that your version of the case note provides clear descriptions, check that the words and phrases you have selected show as well as tell the reader the information you are wanting to convey to them.

Use of key terminology

Check that your version of the case note has made appropriate use of key terminology to both "tell" and "show" the reader the information you are communicating to them. In particular:

- have you made use of the word appears to describe those things that were observable to you?
- have you made use of the word seems to describe impressions that you formed based on cumulative information?
- have you made use of phrases such as evidenced by or demonstrated by to show and describe the basis upon which you formed an opinion or view?

In the event that your case note contains impressions based on what you suspect, but do not know, to be true, check that you have included a qualifying comment (such as, "She hesitated to answer which could indicate that she wasn't certain").

In particular, check that any qualifying comments included within your case note to alert readers to certain information you suspect may be true, provides "room" for either a confirmed or a different and more accurate understanding of the information to be obtained in the future.

Use of respectful language

Check that your case note has made use of language that is personally and culturally respectful. In particular:

- what sense (if any) did you make of the sentence, "Janine's boyfriend is a fair-skinned aboriginal and there is racism" that appeared within the original version of the case note?
- what may have led you to interpret the meaning of this statement in the ways in which you did?
- what sense do you imagine other readers of the original version of the case note may make of this statement?
- on what basis do you think others may interpret the statement in this way?
- does your version of the case note make it clear to readers what you are intending to convey about this matter?
- what sense (if any) did you make of the description of a person as "a problem", that appeared within the original version of the case note?
- what may have led you to understand the meaning of this statement in the ways in which you did?
- what sense do you imagine other readers of the original version of the case note may make of this description and the way in which it is stated?
- on what basis do you think others may understand the description in this way?
- does your version of the case note make it clear to readers what you are intending to convey about this matter?
- does your version of the case note express this matter in "strengths-based" terms?

Avoidance of value-laden judgements and the expression of personal opinion

Check that your case note avoids the use of value-laden judgements and the expression of personal – rather than professional – opinion.

In addition, check that you have selected words and phrasing that will limit the possibilities of a reader misinterpreting what you have written in ways which may lead them to arrive at value-laden conclusions. In particular:

- what sense (if any) did you make of the sentence, "Her language was bad" that appeared within the original version of the case note?
- what may have led you to interpret the meaning of this statement in the ways in which you did?
- what sense do you imagine other readers of the original version of the case note may make of this statement?
- on what basis do you think others may interpret the statement in this way?
- does your version of the case note make it clear to readers what you are intending to convey about this matter?
- what sense (if any) did you make of the sentence, "Janine… needs some help" that appeared within the original version of the case note?
- what may have led you to interpret the meaning of this statement in the ways in which you did?
- what sense do you imagine other readers of the original version of the case note may make of this statement?
- on what basis do you think others may interpret the statement in this way?
- does your version of the case note make it clear to readers what you are intending to convey about this matter?

Other "do's" and "don'ts"

Check that your case note has correctly made use of any dot-points that appear within it. In particular, where dot-points have been used, check that they have been appropriately used for purposes of:

- promoting a "writing style" that is succinct, while also remaining clear and comprehensive
- efficiently organising and presenting information to the readers of your case note in ways which make it easy for them to read and understand
- listing factors which have informed the formation of certain views or opinions stated within your case note
- sequencing the events that occurred which are being reported on within your case note, and
- sequencing actions that were undertaken and/ or are planned, in response to the matters being reported on within your case note.

Where dot-points have been used, check that the sentence in which they have been used, "makes sense" if the commencement of the sentence can be concluded by each of these statements separately listed as a dot-point.

Check that your case note does not make use of any "text-message spelling" or abbreviations. In particular:

- what assumption (if any) did you make about the "b/f" abbreviation that appeared within the original version of the case note?
- what may have led you to make this assumption?
- are you aware whether or not others who read the original version of the case note made the same or a different assumption about the meaning of "b/f"?
- would your understandings about the information provided within the original version of the case note be altered by a different assumption having being made about the meaning of "b/f"?

In the event that your case note incorporates acronyms, check that they have been appropriately used.

In particular, where an acronym has been used, check that the full name or title has been used on the first occasion in which it appears within the case note, with the acronym placed in brackets and stated immediately following the name or title. Thereafter, the acronym may be used to replace the full name or title.

Final check

Refer to the various Reflection Exercises you have completed to undertake a final check of the case note you have recorded.

Conclusion

Your understanding of how to write case notes, and the application of your understanding to your practice should be an ongoing endeavour. We hope this workbook has either helped you to commence or continue on your journey. Below are some useful links to further reading, case note writing events and a records and information management template.

- Australian Association of Social Workers (AASW) Case Note writing guide
- AASW event page (check here for AASW hosted case note writing workshops)
- Records and information management policy template
- Contemporaneous file notes: why have one and what are the requirements? (dundaslawyers.com.au)