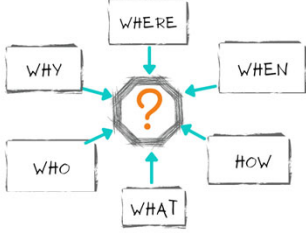
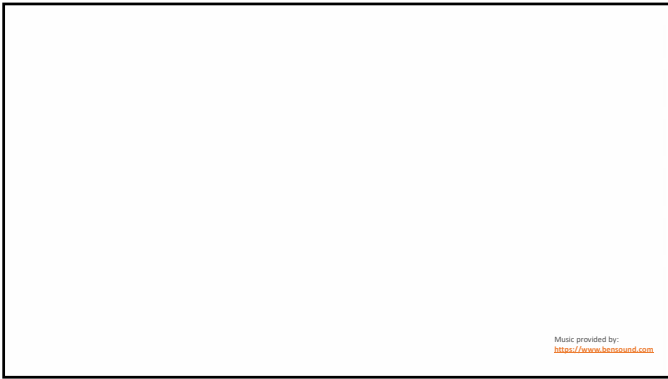


TIPS FOR WRITING EFFECTIVE CASE NOTES





Music provided by: <https://www.bensound.com>



Tips for Writing Effective Case Notes: Part 1 Dr. Grant Colfax, MD, Director of Health City and County of San Francisco
Monday, September 27, 2021, via Zoom

WELCOME

- Presenters Introductions
- Importance of the Evaluations
- Closed Captions
- Participation is encouraged
 - Ask questions in the chat
 - Polling questions in both Mentimeter and Zoom
- Have fun while we all learn



Tips for Writing Effective Case Notes: Part 1
Monday, September 27, 2021, via Zoom



The chat, please sign-in and provide the following:

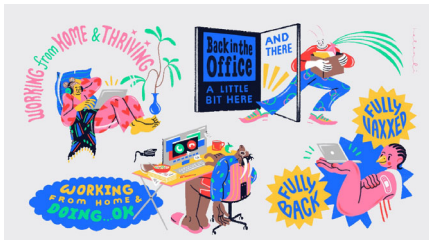
- Name and Pronouns
- Which agency you are from and your role?
- On a scale of 1 to 10, how confident are you writing case notes?
(1= not confident, 10= very confident)



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Music provided by: <https://www.beatsound.com>

What is your current work situation?



Go to www.menti.com
and use code
9891 1095



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Reconnect With Care



Have you seen any of the versions of the Reconnect with Care campaign as shown here?


Go to www.menti.com and use code **6314 9383**



 Tips for Writing Effective Case Notes: Part 1
Monday, September 27, 2021, via Zoom

OBJECTIVES FOR TODAY

- Define when to write a Case Note and what information needs to be included.
- Describe the components of the different documentation styles.
- Identify a documentation style that works best for your needs.


 Tips for Writing Effective Case Notes: Part 1
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Why is it important to document?

Case Notes are legal documents which may be viewed by judges, attorneys, clients, etc. They provide a measure of protection and substantiate compliance with auditors.

Accurate record keeping provides accountability to the

- Client
- Organization
- Funder

 Tips for Writing Effective Case Notes: Part 1
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Purpose of Documentation

- Measures outcomes and interventions
- Reminds Case Manager of services provided to the client
- Presents accurate history of crisis patterns



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Case Notes

Most effective when written with information that is:

- Accurate
- Objective
- Specific
- Concise
- Consistent



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Case Notes must be written in past tense and third-person

Always include:

- WHO:** The name, qualifications and/or title of the qualified staff providing the service or intervention.
- WHAT:** What was done, the specific interventions/skills training services provided
- WHERE:** The physical site where services were provided (office, client's home, etc.).
- WHEN:** Date, length of service (in units and time) and time of day.
- WHY:** Why the services were done. The intended goal, objective and outcome related to the interventions/skills training services.
- HOW:** How the interventions were done (concrete, measurable & descriptive) along with the client's response and progress.



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Q & A

Put your questions in chat



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Documentation Format Styles

S-O-A-P: Subjective, Objective, Assessment, Plan

D-A-P: Data, Assessment, Plan

G-I-R-P: Goal(s), Intervention(s), Response(s), Plan



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S-O-A-P

Subjective, Objective, Assessment, Plan

Subjective Data: What the client shared/reported to you during the session

Objective Data: Factual observations, without bias

Assessment: Your summary of what you believe is really happening

Plan(s): Document what you and the client have agreed the client needs to address in between sessions/upon discharge



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D-A-P Data, Assessment, Plan

Data: What did the client say during the visit? What did you observe during the visit? Include both non-verbal and intuitive senses.

Assessment: What is going on? How does the client appear? What is their mental/physical state? Include both non-verbal, working hypotheses, and gut hunches about his/her situation.

Plan: Response or revision to his/her overall situation; next visit date, any topics to be covered next session, etc. What is your plan of action; what are you (or the client) going to do about it? What is your follow-up plan with the client?



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G-I-R-P Goal(s), Intervention(s), Response(s), Plan

Goal: The objective that is being worked on

Intervention Used: coached, prompted, assisted, encouraged

Response(s) of the client feelings and/or action words

Plan for next steps: next visit, client will, client plans to?



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Case Study

Listen closely, there will be an exercise after.



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Do's: General professional guidelines

Things to include:

- Highlighting the client's strengths, supports and coping mechanisms
- Specification of where the information came from (i.e., client reports/states, as per medical report)
- Client's identification on each page
- Documentation of the link of successes and failures to the service plan
- Tracking of client activities (job pursuits, assessments, etc.)
- Tracking of program/agency monitoring activities (contacts, lab results, etc.)



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Don'ts: General professional guidelines

Things to avoid:

- Casual abbreviations
- Taking shortcuts at the cost of clarity (re-read out loud)
- Generalizations or over-interpretations
- Grammatical errors
- Negative, biased, and prejudicial language.
- Details of the client's intimate life unless it is relevant to care plan.
- Use of medical diagnoses that have not been verified by a medical provider
i.e. rather than "the client is depressed", say, "client states that he is having feelings of sadness or depressed mood" or "client describes seeing hallucinations or feeling sad on a daily basis"



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Is this an effective case note?

Client called Case Manager (CM).
 Client stated that they lost their job and will be short to cover their rent.
 Client stated that they will run out of money for food and have been taking meds. Client is stressed and worried. Both will meet again to fill out application and get grocery box.



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Which documentation style is this an example of?

Client called CM on 9/20 at 10 am.

The client stated that they recently lost their job and that they will be short \$150 to cover their rent due on 10/1 and asked for emergency financial assistance. Client reported being food insecure due to loss of income.

Client reported medication adherence despite feeling overwhelmed lately. Client appeared to be very stressed out and worried about the situation.

CM and client agreed to meet tomorrow 9/21 at 10 am to fill out emergency financial assistant application. Client agreed to pick up grocery box from Health Educator on 9/22 at 10 am.



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Q & A

In the chat, please answer the two questions below:

- On a scale of 1 to 10, how confident are you writing case notes? (1= not confident, 10= very confident)
- How do you feel about Case Notes now?



Tips for Writing Effective Case Notes: Part 1
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References

Writing Effective Case Management Notes

<https://www.icanotes.com/2020/11/11/writing-effective-case-management-notes/>

Case Management 101: Writing Case Notes

<https://www.healtorture.org/resource/case-management-101-writing-case-notes>

Counselor Tips DAP Notes for Counselors <https://www.youtube.com/watch?v=hFW3FEnzb6U>

SOAP NOTES <https://www.youtube.com/watch?v=9TZqTtbBVXc&t=139s>

Writing Progress Notes Using GIRP <https://www.youtube.com/watch?v=MGiJavao6I6c&t=613s>



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Future SF HIV FOG Training Events

October 20, 2021

Surviving Open Enrollment: Tools and Strategies for HIV Frontline Workers

Upcoming Topics:

- Structural Racism in Health Care
- Tips for Writing Effect Cases Notes: Part 2
- And more . . .



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Reminder Complete Evaluation

Check your email for the link to the evaluation

<https://www.surveymonkey.com/r/2VVKW2R>



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Thank You

SF HIV FOG Steering Committee

- | | |
|---|---|
| Andy Scheer, SF City Clinic | Beth Chiarelli, Women HIV Program (WHP) at UCSF |
| Beth Mazie, PRC | Brian Elliot, ALRP |
| Dawn Evinger, PRC | Jason Cinq-Mars, PRC |
| Jessica Price, UCSF Bay Area & North Coast AETC | Juba Kalamka, St. James Infirmary |
| Monica Reyes, MNHC | Talia Roven, Shanti Project |
| | Kevin Hutchcroft, HIV Health Services SF DPH |

San Francisco Department of Public Health: HIV Health Services
And All of Our Community Partners



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