



SCHOOL  
OF  
SOCIAL  
WORK

# **DO THE WRITE THING:** Documentation Training

## **Trainer Outline**

## **Continuing Education**



UNIVERSITY  
OF ARKANSAS  
AT LITTLE ROCK

## TRAINER OUTLINE

**Audience:** This training was developed at the request of Area Managers to address concerns about the quality of documentation in the CHRIS system, especially the contacts screens. This training is designed for DCFS personnel who document client information in the CHRIS System. It is most appropriate for FSWs and SSAs but can also be valuable for Supervisors and Specialists.

**Organization:** This workshop is designed to have a classroom and a CHRIS lab component. The workshop materials consist of a trainer outline, a participant manual and handouts. The training outline sets out the training objectives, tentative time frames and detailed instructions for conducting classroom and CHRIS lab exercises. The session is co-trained by a MidSOUTH Classroom trainer and a CHRIS trainer. Both trainers should be present for the entire workshop, regardless of whether the participants are in the classroom or in the lab.

**Areas to Emphasize:** This training focuses on the contact screens in CHRIS. It does not address the FSRNA or the case plan. The trainers should emphasize how the information in the contact screens should reflect the Division's efforts to assure the health and safety needs of the children are met and should reflect the quality of the Division's contacts with family members and providers.

**Time:** This workshop was designed to be presented in a three-hour time slot.

### Materials List

#### Standard Classroom Set Up:

Class roster/Sign-in sheets (morning and afternoon)  
Name tents  
White board markers  
Flip chart set ups for small group work (easel, pad, markers)  
Participant Manuals  
PowerPoint Projector  
Computer station with CPU, VCR, DVD, speakers

#### Workshop Specific

Eight case Vignettes (Sanchez Case)

The video is shown in the lab. Be sure that the speakers in the lab work and have enough power that the presentation can be heard.

Handouts 1- 3

PowerPoint Presentation – Do the Write Thing!

## TRAINER OUTLINE

### SECTION 1: CLASSROOM COMPONENT

TIME: 75 Minutes (9:00-10:15)

#### Objectives: Participants will

- Understand the importance of objective and specific documentation in the delivery of services to families.
- Understand what belongs in documentation and what doesn't belong in documentation.
- Practice written documentation skills.

#### Materials

- Participant Manual
- Handout 1 – Icebreaker
- PowerPoint

**Trainer Note:** Prior to the start of class, put **Handout 1 (Icebreaker)** out on the tables. There should be one for each person registered. As participants come in, encourage them to complete the handout by identifying errors and correcting them. This exercise can serve to get participants focused on the material and can also give the trainers an idea of the participants' basic level of knowledge about grammar.

Trainer should also preview the PowerPoint as it supplements teaching points set out in this outline.

#### A. Introductions and Housekeeping

1. Slides 1 – 7 set out the important points to be covered during the introductions and housekeeping period.
2. The trainer also needs to decide whether or not to go over the ice breaker handout at this time or whether to cover this material later in the classroom section of the training.

3. Page 1 in the participant manual has the Agenda and Training Objectives (Slide 2)
4. Wrap up the introductions and housekeeping with a brief "What's In It for Me" exercise to elicit participants' expectations of training and to focus them on how this material can help them in their jobs. (This activity is addressed on slide 7)

**B. Opening Activity – Purposes of Documentation (Slides 8 – 10)**

1. Divide the class into small groups for the following activity.
2. Ask the small groups to answer the following questions (The questions are on the PowerPoint – slide 8):
  - a. **Why** is documentation important?
  - b. **What** information belongs in documentation?
  - c. **What** information does not belong in documentation?
3. After the groups have had time to discuss these questions, refer to page 2 in the Participant Manual.

**C. Documentation Basics (Slides 11- 30)**

1. Cover the material on pages 3 through 6 in the Participant Manual. This material is presented visually to participants through the PowerPoint presentation.
2. Consider giving the participants an opportunity to come up with a "better" example before showing the trainer's suggestion on the PowerPoint.

**D. Practice – Jones Contact (Small Group Activity)**

1. Direct participants to page 7, Jones Contact.
2. Ask each small group to identify 8-10 mistakes, based on the material just covered.
3. Report out then take a break. Ask the class to reconvene in the CHRIS lab.

**BREAK**

## SECTION II: Documentation Practice

TIME: 90 Minutes (10:30 – 12:00)

### Objectives: Participants will

- Practice putting an accurate contact into CHRIS.
- Discuss and review how information in the contact screen relates to information needed in the FSNRA and Case Plan.

### Trainer Note: What you need to do before you enter the CHRIS Lab:

- Review the interviews in the Sanchez investigation (referral no. 1225871) and the Contact hand-out on the Sanchez case
- Make sure you have a copy of the Sanchez video.
- Get password of the day and write it on the white board.
- Complete the CHRIS Log in-sheet for each participant in the class (Handout 2)  
\*Remember the trainer must do the User-name look up in order to get the students' usernames. Their password will be the last four digits of their SSNs.
- You will also have to assign a CHRIS Log-ins and Passwords for each participant.  
The Sanchez case is listed under Super-one, Student numbers 1-20. For example the user-name will be student1; password -tstudent1. However the trainer case is listed under super-two, student40

### Materials

- Handout 2 (CHRIS Login)
- Sanchez Video
- Handout 3 – Sanchez Contact
- Participant Manual
- Evaluations

### A. Logging into CHRIS

1. Pass out **Handout 2** that has each student's user name and password and the student's Training CHRIS Login information.
  - a. Log into the MidSOUTH desktop.

- b. Double click the CHRIS icon.
  - c. Enter the Password of the Day.
  - d. Enter the CHRIS User ID and User Password from the handout.
  - e. Tell participants to check their workloads to be sure they see a Sanchez case.
2. Instruct participants to turn to **page 8** in the Participant Manual for a place to take notes.
3. Inform participants that they have just been assigned the Sanchez case and ask what screens they would review first. Hopefully, someone will say the investigation screens to determine why the case was opened. If they don't, share with participants that reviewing the investigation can be very helpful. It allows you to see the true findings and gives you an idea of some of the health and safety concerns for this case.

**B. Show the Sanchez Investigation (Referral number 1225871)**

- Finding Screen
- Summary Screen (Invest. Close)
- **NOTE: Participants will not be able to see this investigation on their computers.**
  1. Instruct them to just watch as the trainer demonstrates the Finding and Inv. Close screens.
  2. IF you have a large class you may want to read to them the Findings and Inv. Close notes.
  3. Make sure to show the client's ages. When they see that the children were left alone for up to 8 hours it will be more relevant.

**C. Show the Sanchez video and remind participants to take notes.** They will have to use this information shortly.

**D. Enter Contact-**

**Contact Date:** 03/07/2007 or current date

**Time:** 10:00 am

**Location:** Face to Face (Home)

**Status:** Completed

**Purpose:** Family Contact Weekly

**Clients Participant:** Stella, Emily, and Ramona Sanchez

1. Remind them of some of the things they will want to avoid such as:
  - Labels,
  - Judging,
  - Personal opinions etc.
2. Also inform participants that the trainer will review a couple of the contacts on the overhead with the class. Encourage them to write their contacts in a way that would not identify them as the worker...Ex. FSW Loggins, would be FSW student1. That way when we review the contacts no one knows who wrote what.
3. Review Contacts (1 or 2 depending on time)
  - a. When reviewing the contact always have class start with a strengths prospective and focus on what the worker did really well.
  - b. Then go into helpful suggestions for improvement. After you review one or two ask the class if there is anything they put in their contacts that these two workers did not.
  - c. Summarize with **Handout 3 – Sanchez Contact**.

**E. Second Sanchez Contact**

This section was initially designed to have the class do an interview with Ms. Sanchez (the second worker contact). The PowerPoint has the speaking and training points to conduct the interview. However, if the class is large there will not be time to do the interview. Instead, discuss the second contact while the students are in the lab. Refer the class to **page 9** in the Participant Manual.

1. Ask the class discuss the strengths of Mrs. Sanchez. What you feel the case plan will reflect at this point.
2. Discuss FSNRA and how to gather information for that screen.
  - a. Have them tell you what information they have already obtained that would aide in completing the FSNRA.
  - b. Then discuss how you would get the information still needed to complete the FSNRA. For example how would you ask Mrs. Sanchez about Domestic violence? Would you ask her if you husband beats her?
  - c. No, some questions you may ask are: Tell me about your relationship with your husband, what happens when you disagree on something, how you solve disagreements...
3. Remind participants about the CFS- 590, the Invitation to a Family-Centered Meeting (14 days & doc. Track)



4. For wrap up and review use the Documentation Checklist on page 10 in the Participant Manual. Ask participants to complete an evaluation.



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# Do the Write Thing: Documentation Training

## Participant Manual

## **DO THE “WRITE” THING!**

### **Documentation Training for DCFS Staff**

#### **Agenda**

- I. Introduction/Housekeeping
- II. Opening Activity
- III. Documentation Basics
- IV. Documentation Practice
- V. Conclusion

#### **Objectives:**

- Participant understands the importance of objective and specific documentation in the delivery of services to families.
- Participant understands what belongs in documentation and what doesn't belong in documentation.
- Participant understands how to input accurate CONTACT information into CHRIS.
- Participant practices documentation skills in the classroom and in the lab.

## PURPOSES OF DOCUMENTATION

- Reasonable Efforts:
  - First contact with client family
  - Problem identification and assessment
  - Services offered
  - Acceptance of services
  - Appropriateness of services:
    1. Services to prevent removal
    2. Services to reunite family
    3. Services to provide permanency
- Accountability
- Organizes and Reminds
- Ongoing Record
- Provides Information
- Provides Continuity of Services
- Agency Defense
- Quality Control
- Reporting

## WHAT BELONGS IN CHRIS CONTACTS

- Date/Time
- Type of Contact (Reason)
- People Present
- Details
- Progress
- Health/Safety/Needs/Services
- Case Plan Issues: You must address the issues of safety, permanency, and well-being in all out-of-home cases.

### **Safety**

- Is the child at risk of harm? Are there unexplained marks or bruises? Are there issues of concern such as lack of food, inappropriate clothing, inadequate hygiene, or environmental neglect?
- Is the foster care placement safe and stable? What's the child's attitude toward the provider? What's the provider's attitude toward the child? How has the child adjusted to the foster home?

### **Permanency**

- What is the permanency goal?
- How would you discuss permanency with the parents? How will you discuss permanency with the children? What would you say to a toddler? A teenager?

### **Well-Being**

- Are the child's medical and dental needs being met? Are appropriate counseling services being provided?
- How is the child adjusting to and performing in school? Are there academic or behavioral issues that need to be addressed?
- How are visits going? What are the child's feelings and behaviors before and after visits? Are the parents responding to the needs of the child during visits? Are the parents demonstrating new skills during visits?

## WHAT DOESN'T BELONG IN DOCUMENTATION

### Don't Use Personal Opinion:

**Poor:** "The client freaked out!"

**Better:** "Mrs. Jones sobbed uncontrollably; tears were running down her cheeks, and she kept wringing her hands."

*Avoid derogatory or opinionated word; and support with facts and descriptive information.*

**Poor:** "He dressed like a slob!"

**Better:** "The client wore frayed jeans with holes in the knees, old loafers with no socks, and a t-shirt with food stains and holes in it."

**Poor:** "The client was so lazy!"

**Better:** \_\_\_\_\_ (your suggestion)

### Don't Use Uncommon Language:

- Abbreviations
- Symbols
- Jargon

**Poor:** "I am an FSW from DCFS here to do a CFS-123 for your P.S. case, ASAP!"

**Better:** \_\_\_\_\_ (your suggestion)

### Don't Use Excessive Words:

**Poor:** "The client called twice before he got hold of the chemical dependency unit to see if he could come for an assessment. The counselor was busy and said he would call him back which he did the next day. They set up an appointment for Tuesday, April 23 at 2:30 p.m."

**Better:** "Mrs. White scheduled an assessment with the substance abuse counselor for April 23 at 2:30 p.m."

*The results are more important than the steps.*

### Don't Use Labels:

**Poor:** "The woman is a drunk!"

**Better:** "Mrs. Vino tells worker that she begins drinking in the morning and drinks all day. At worker's last visit, Mrs. Vino was asleep on the couch and the room was filled with wine bottles and the odor of vomit."

**Poor:** "The woman is crazy!"

**Better:** \_\_\_\_\_ (your suggestion)

**Poor:** "The man sexually abused his daughter."

*Unless the man has been convicted of a crime, don't state this.*

**Better:** "Mr. Brown is alleged to have sexually abused his daughter."

**Poor:** "He's a wife beater."

**Better:** "He allegedly beat up his wife."

OR

"Mrs. Brown stated her husband 'blackened my eye.'"

*Use quotes when appropriate.*

### Who is Your Audience?

- Supervisors
- Co-Workers (Local and State)
- Administrative Staff
- Fair-Hearing Officers
- State/Federal Reviewers
- Attorneys (OCC, AAL, Parent Counsel, Prosecuting Attorney)
- Judges
- Legislative Body
- Other

## HELPFUL HINTS FOR DOCUMENTATION

- Document after every contact
- Write in complete sentences
- Write in third person
- Be accurate and objective
- Use spell/grammar check
- Be specific:

**Poor:** "The room was dirty."

**Better:** (Describe the room with a focus on health and safety issues.)

**Poor:** "Had private conversation with child."

**Better:** (Describe how the child's doing in school, therapy, foster home, etc.)

**Poor:** "Went to court on this case."

**Better:** (Give details as to who attended court, what happened, what the judge ordered, date of the next hearing, etc.)

### Things to Avoid:

- Avoid extreme and intimate details
- Avoid gossip
- Avoid details that could be misused
- Avoid criticism with the department or other agencies
- Avoid documenting what you're supposed to do (only what you DID)
- *Keep religious, political, and personal opinions out!*



**If it isn't written down, it didn't \_\_\_\_\_!**



## **Jones Contact**

### ***POOR EXAMPLE***

05/10/08

6:15 am

Type: Family Contact Weekly

I went to the foster home on my way from work around dinner time. Sally (fostermom) was cooking. Her made a green bean cassrole, sweet potatoes, fried chicken and strawberry cheese cake. She asked me if I could stay for dinner so I stayed. Sally informed me that she would need respite care for the week of July 4, she was going to Vegas to see her daughter Mary(biological). Mary had gotten addiceted to gambling and was in a treatment facility in Vegas. She maxed out all of Sally's credit cards and the only way to keep Sally from going to jail was to have her prosecuted for indenity theft. The treatment facility was part of her sentence. This will be the first time Sally has seen her daughter in almost six months. Sally is really nervous, but I assured her that everything alright. That Mary was finally getting the help she needed. I told her a would put her request in and find respite for the three smith foster kids. The Smith kids were there. After dinner I told her I would see her next week and that she was doing a great job.

## Ramona Sanchez Case

*\*Path: Workload / Other / Assoc. R/I / Show / Invest. / Findings*

### **Findings:**

*\*Path: Workload / Other / Assoc. R/I / Show / Invest. / Inv. Close*

### **Inv. Close:**

### **First Contact: VIDEO**

**Date:**

**Time:**

**Participants present:**

**Purpose of Contact:**

### **Notes:**

*\* CHRIS paths reflect the path to go from an OPEN CASE to the linked investigation.*

## **Ramona Sanchez Case**

### **Second Contact:**

**Date:**

**Time:**

**Participants present:**

**Purpose of Contact:**

**Notes:**

## **Family Strengths, Needs, and Risk Assessment**

**Family Cultural Factors**

**Family's Perception of DCFS**

**Family Fears**

**Parenting**

**Marriage/Relations**

**Family Resources/Strengths**

**Family Connections/Supports**

**Loss/Grief Issues**

**Court Involvement**

**Mental Health (Parent)**

**Substance Abuse (Family)**

**Education**

**Financial/Employment/Vocation**

**Housing/Basic Needs**

**Medical/Dental (Family)**

**Domestic Violence**

## DOCUMENTATION CHECKLIST

- ☐ Case-plan goals and objectives are the guiding subject of your narrative. Narrative should document progress or lack of progress in accomplishing goals.
- ☐ Document all services offered which were appropriate to remedy the situation.
- ☐ Document all services accepted, which were appropriate to remedy the situation, and who accepted (and any reason given for acceptance.)
- ☐ If services were offered but refused, document who refused the service and the reason given for refusal.
- ☐ Document efforts to reunify the family in cases of out-of-home placement.
- ☐ Paint an accurate picture of the event.
- ☐ Your narrative is documented proof of the event. Keep it professional!
- ☐ Well-written documentation will stand up in court.
- ☐ The tone of your narrative should display confidence in your understanding of the event.
- ☐ Refrain from labeling or drawing conclusions. Keep values and personal opinions out of your documentation.
- ☐ Document any changes in visit schedule, why it was changed, who was notified, and when they were notified.
- ☐ Document all visits and all telephone calls.
- ☐ Keep your documentation current. It is more difficult to attempt to recreate the event.
- ☐ Documentation is accurate, concise, professional, and truthful.
- ☐ Documentation is complete and can be shown to anyone.
- ☐ Write in third person. (Worker went to the home...)
- ☐ Always check for correct spelling and grammar!

Handout 1

**ICE BREAKER- Sentence Structure Errors**



1. **Incorrect:** James enjoys bike riding and to visit friends.

**Correct:**

2. **Incorrect:** I tried to go to the supermarket near my house, but they were closed.

**Correct:**

3. **Incorrect:** She called he didn't answer.

**Correct:**

4. **Incorrect:** He was good in English, history, and playing soccer.

**Correct:**

5. **Incorrect:** The house stunk.

**Correct:**

6. **Incorrect:** I heard a loud noise.

**Correct:**

7. **Incorrect:** Had Court

**Correct:**

8. **Incorrect:** The caseworker informed the Mrs. Jackson that caseworker will be changing since the current worker is going to a different position.

**Correct:**

9. **Incorrect:** Hannah is at the Forrest with her grandmother.

**Correct:**

10. **Incorrect:** Reserve on reasonable efforts until case plan is submitted to court.

**Correct:**

## Handout 2

### LOG INTO CHRIS (MidSOUTH Training Data Base)

1. To get to the desk top on a MidSOUTH lab computer, double click the word MidSOUTH in the upper left corner of your monitor screen.
2. Login to the computer using the Username and Password provided:

USERNAME: \_\_\_\_\_

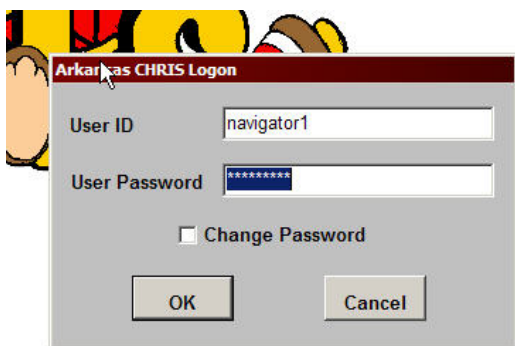
3. Double click the CHRIS icon on the desk top.



4. Enter the password of the day given to you by your MidSOUTH CHRIS Trainer.



5. Now you should see the CHRIS Logon Box.



6. Enter your CHRIS User ID and Password:

Training CHRIS User ID:

Training CHRIS Password

\_\_\_\_\_

\_\_\_\_\_

### Handout 3

### Sanchez Contact

**Contact Date:** 03/07/2007

**Time:** 10:00 am

**Location:** Face to Face (Home)

**Status:** Completed

**Purpose:** Family Contact Weekly

**Participants/Client/Collateral:** Stella, Emily, and Ramona Sanchez

When FSW Jackson arrived at the Sanchez house, she was greeted by the two Sanchez girls, Ramona and Emily. Ramona stated her mother was at Aunt Sue's home [pointed]. When FSW Jackson asked her where Aunt Sue lived, Ramona said, "I will tell you if you give me some food." Meanwhile, Ms. Sanchez came up on the porch and scolded Ramona for begging a stranger for food.

FSW Jackson entered the house behind Ms. Sanchez. The paint on the walls was chipping; the trash can was overflowing with trash; the counter tops were covered with magazines and envelopes. When Mrs. Sanchez opened the refrigerator, condiments were the only thing visible. Mrs. Sanchez handed Ramona and Emily a jar of peanut butter that was almost empty and told them to run and play.

Mrs. Sanchez told FSW Jackson that she had not been to the store because she had no money. Her rent was late and when there was a knock on the door, she was afraid it was the landlord. Mrs. Sanchez is currently unemployed and has no family in this town. She had moved here with her husband, but he left. Mrs. Sanchez was hesitant to inform her brothers of the situation because they did not agree with her decision to leave.

Mrs. Sanchez insisted that the daycare called this report in just to get rid of her kids because she had no money. She also admitted to leaving the girls home from time to time, but stated that she always had the next-door neighbor check on them.

FSW Jackson summarized this family's needs: employment, child care and food. Mrs. Sanchez agreed. FSW Jackson mentioned state resources to help purchase food and obtain daycare. Mrs. Sanchez said, "We are not those types of people who get on welfare. I have faith that something will happen." FSW Jackson informed Mrs. Sanchez that there were other programs besides welfare; she was able to convince her to go to a food bank. FSW Jackson gave Mrs. Sanchez her business card and confirmed an appointment with her for the following week to work toward meeting the needs of this family.