10 TIPS FOR WRITING PROFESSIONAL CASE NOTES

1. **Apply the 3 Cs of communication.** With the reader in mind (e.g., colleague, supervisor, funder), ensure notes are Clear, Concise, and Consistent – also use the 5 Ws (Who? What? When? Where? Why?) so readers know exactly what's going on. Use as few words as possible, with short sentences or bullet points. Be consistent; it's difficult for readers to follow if writing style keeps changing.
2. **Be professional.** "Professional" is defined as conduct or qualities that mark a profession. The Standards and Guidelines for Career Development Practitioners (S&Gs) lay out such conduct. As case notes reflect your professionalism, ensure they comply with relevant Canadian Acts and Regulations and do not contain "red flags" (e.g., omissions or errors, delayed entries, inconsistencies, criticisms of clients or other stakeholders, unsupported opinions).
3. **Develop your own writing style.** Writing styles include voice (1st or 3rd person), verb tense (past, present, future), and standards (e.g., use of pronouns, contractions, acronyms). Proofread carefully to ensure consistency and accuracy; check spelling, grammar, and punctuation.
4. **Include core details in each note.** The basics, for clarity, include: date of contact, client's and CDP's names, titles if appropriate, type of contact (e.g., in-person, phone, email), summary of interaction, action(s) planned/taken, current progress, and next steps.
5. **Use factual statements.** Write about what you hear, see, and experience during your work with clients, including what clients tell you. Don't include hearsay, assumptions, or opinions (e.g., avoid "I think," "I assume," and "Probably." Support facts, as necessary, with external documentation.
6. **Write objectively.** Document client interactions without judgement or biases. Instead of writing, "Client arrived drunk to the session," note "Client smelled of alcohol and was unsteady on feet." Provide factual details that can be supported by direct observation or with such third-party documentation as an assessment report or doctor's note.
7. **Respect privacy regarding sensitive topics.** Clients may over-share confidential information. Use the complementary principles of "do no harm" and "do good" to guide what to record in case notes. Clients may be denied services (or worse), if information is inappropriately disclosed. CDPs and their agencies may be culpable.
8. **Make a compelling case to support your client.** When writing a rationale to support your client's goals, be sure to include: a statement of purpose for proposed interventions, why each intervention is necessary, what barriers are addressed, how the interventions assist with reaching goals, expected client outcome, and a detailed breakdown of associated costs (if any).
9. **Thoroughly document file closures.** Ensure that all CDP action items are complete. If client action items and/or goals are not complete, acknowledge this in notes, explaining why items are still outstanding. If action plan is complete and desired outcomes achieved, ensure your notes reflect this. File closures should follow agency protocols to ensure funder mandates are fulfilled.
10. **Consider alternate case note formats.** Case note structures vary from agency to agency and CDP to CDP. If your organization does not have a required protocol, try using SAR, Great 8, POR, SOAP or others to enhance your case notes. Many human and social service organizations use models like these to organize note-taking manner.

imagine • achieve • excel

Life Strategies Ltd.
604.856.2386
info@lifestrategies.ca
www.lifestrategies.ca