

Documentation Checklist: What to Include in Your Documentation

All case notes should reflect the activities and events that occurred for the individual child/family. All entries to records shall be kept current and must be legible, dated and the author designated. If hard copy, the author shall sign and date the entry. For more information on the policies for recordkeeping please visit the Child and Family Connections Procedure Manual section on [Recordkeeping](#).

What to include in your documentation:

- ✓ mode of contact (face to face, phone , where)
- ✓ reason for the contact
- ✓ any information, education, or instructions given
- ✓ outcome of the contact
- ✓ plan for the future (next steps and delegated responsibilities)
- ✓ client's refusal or noncompliance (including any specific behaviors)
- ✓ when and interpreter is present or involved in the activity
- ✓ any follow up activities
- ✓ document all contacts and services rendered
- ✓ always be clear and concise