
A close-up photograph of two hands, one from a white-skinned person and one from a darker-skinned person, positioned to form a heart shape. The hands are resting on a dark, textured carpet. The background is a soft, out-of-focus white light.

Building Strong Foundations: Effective Service Documentation

Tennessee Strong Families



Why is Effective Documentation Important?

- **Ensures Consistent Service Delivery:** Clear documentation helps direct service professionals understand protocols and deliver services consistently, regardless of who provides them.
- **Improves Communication and Collaboration:** Well-documented services facilitate communication among direct service professionals, program participants, and referral partners.
- **Supports Quality Improvement:** Comprehensive documentation allows you to track progress, identify areas for improvement, and demonstrate program effectiveness to funders.
- **Minimizes Risk and Ensures Compliance:** Accurate documentation protects your organization by providing a clear record of services delivered and adherence to regulations.



Types of Service Documentation

- Needs Assessments: Tools to gather information about a client's situation, strengths, and challenges.
- Service Plans: Collaborative documents outlining goals, interventions, and timelines for service delivery.
- Progress Notes: Records of interactions with clients, detailing progress and any adjustments needed to the service plan.
- Reports: Summarize program activities, client outcomes, and other relevant data for funders, stakeholders, and internal use.

Essential Elements of Effective Documentation

- Uses clear, concise, and objective language
- Captures demographic information (age, gender, race, etc.), presenting problem(s), and brief, relevant background information
- Identifies client strengths and needs, service goals, and interventions/services
- Assigns responsibilities with dates, times, and signatures as needed
- Plans progress Monitoring:
 - Methods (check-ins, surveys, milestone tracking, etc.)
 - Frequency (weekly, Monthly, etc.)
- Kept in secure storage and with written access protocol(s)

Tips for Effective Documentation

- Standardize templates and forms.
- Use electronic documentation systems when feasible.
- Schedule dedicated time for documentation.
- Encourage clear and concise writing.
- Provide training on documentation best practices.

Effective Service Documentation is an Investment in Quality Care

- It strengthens communication, collaboration, and program effectiveness.
- By prioritizing clear and consistent documentation, you can better serve your families and achieve your program goals.



Assessment/Screening Tools

- Social Determinants of Health Screening
 - [Find Tools :: Risk Screening Tools Review \(kpwashingtontresearch.org\)](http://kpwashingtontresearch.org)*
 - [Screening_Toolkit_2018.pdf \(healthleadsusa.org\)](http://healthleadsusa.org)
 - [The PRAPARE Screening Tool | PRAPARE](#)**
 - [Toolkit | AAFP](#) (includes action plan templates)
 - [Short Patient \(Print\) Social Needs Screening Tool \(aafp.org\)](http://aafp.org)
 - [The AHC Health-Related Social Needs Screening Tool \(cms.gov\)](http://cms.gov)***
 - [Microsoft Word - HealthBegins Social Screening Tool and Guide - v6.docx \(aamc.org\)](http://aamc.org)

*Searchable database for appropriate assessment tools

**Available in multiple languages

***Highly recommended by several sources

Assessment/Screening Tools

- Strengthening Families' Protective Factors
 - [PFS-User-Manual.pdf \(friendsnrc.org\)](#)
- Well-Being Assessment
 - [100MLives Well-Being Assessment Adult 24 items FINAL \(harvard.edu\)](#)
 - [Our Flourishing Measure | The Human Flourishing Program \(harvard.edu\)](#)
 - [100MLives_Well-Being-Assessment_Adult_12-Item.pdf \(ihi.org\)](#)

The Service Plan



The Family Tracker

