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 (kpwashingtonresearch.org)*
  - Screening_Toolkit_2018.pdf (healthleadsusa.org)
  - The PRAPARE Screening Tool | PRAPARE**
  - Toolkit | AAFP (includes action plan templates)
  - Short Patient (Print) Social Needs Screening Tool (aafp.org)
  - The AHC Health-Related Social Needs Screening Tool (cms.gov)***
  - Microsoft Word - HealthBegins Social Screening Tool and Guide - v6.docx (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