**Professional Documentation Guidelines**

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| ***Documentation Tip*** | ***Do this…*** | ***Not this…*** |
| Use full sentences, paragraph form  Check your grammar and punctuation | FSS White completed a home visit with Sarah Jones and Thomas Nelson. No health or safety hazards were observed in the home. | HV on Jones/Nelson case.  No hazards.  No concerns. |
| Use past tense  Do not change or mix tenses | Ms. Hall discussed her insulin injections. She stated that she never missed any doses. | Ms. Hall discussed her insulin injections. She states that she never misses any doses. |
| Use third-person perspective | FSS Foss met with Dr. Wu and she stated… | I met with Dr. Wu and she told me …. |
| Start contacts by identifying who the person is in relation to the case. | FSS Dunn met with Ms. Sheila Kellogg, daughter of Ms. Smith who stated... | FSS Dunn met with Ms. Kellogg, who stated … |
| Refer to adults with title and last name *(except for reporter)* | Mr. Jones, Mr. Smith, Ms. Little | Frank, Paul, Jane |
| If multiple adults have the same last name, use first & last name or first initial & last name | Tim Jones said that Jason Jones might be late. J. Davis stated that K. Davis sleeps upstairs. | Mr. Jones stated that Mr. Jones hit him. |
| Use full terms for a relationship | Daughter, husband, niece, grandparent | Mee-maw, Pappy |
| Do not use contractions | Do not, Does not, She is | Don’t, Doesn’t, She’s |
| Identify FSS by Last Name | FSS Jackson met with the family at their home. | FSS met with the family at their home. |
| Use full dates | Ms. Harris told Ms. Clark that Mr. Harris is out of town until October 1, 2017. | Ms. Harris told Ms. Clark that Mr. Harris is out of town until the end of the week. |
| ***Documentation Tip*** | ***Do this…*** | ***Not this…*** |
| Quotes are the exact words that someone spoke; quotes are not used with a  paraphrased statement of the comment | Ms. Brown stated that her mother’s care was her “own business” and declined DSS services. | Ms. Brown stated that her mother’s care was her own business and declined DSS services. |
| Avoid amplifiers  Avoid judgmental words  Avoid absolute words | Mr. Key was 30 minutes late for his Medicaid appointment. He did not bring the needed verifications. | Mr. Key was very late as usual. He failed to bring the needed verifications. He never follows instructions. |
| Avoid interpretive, biased, or judgmental statements. | FSS Cotton observed trash piled throughout the home, preventing clear walkways. There were feces smeared on the bedroom walls. | The house was very dirty. There was nasty stuff on the walls. Mr. Jones never cleans the house. |
| Avoid unverified diagnoses | Mr. Lopez is 68 years old and is unable to speak. FSS observed that Mr. Lopez does not respond when his name is called. | Mr. Lopez is demented. |
| Use descriptions instead of conclusions | Ms. Johnson stated that the FBI and the CIA are infiltrating her brain and she believes that FSS Carr is a secret agent from the FBI. | Ms. Johnson is paranoid and delusional. |
| Use descriptive facts instead of drawing conclusions | FSS Slate observed that Mr. Miller’s speech was slurred and he stumbled when he walked. FSS noted the smell of alcohol. | Mr. Miller was intoxicated. |
| Use descriptive facts instead of unsupported conclusions | Mr. Collins has no reported or observed medical issues. Mrs. Collins reported that Mr. Collins was examined by his doctor on  1/16/2023, and no concerns were noted. | Mr. Collins is healthy. |
| Attribute “facts” to the source | The family lives in a residential neighborhood with a low crime rate, according to the locality police website. | The family resides in a good and safe neighborhood. |
| Avoid non-pertinent information | Mr. Young has a large dog. He warned FFS Dunn that the dog bites. | Mr. Young has two lovely plants on his front porch. |
| ***Documentation Tip*** | ***Do this…*** | ***Not this…*** |
| Focus on significant information | FSS Long developed a rapport with Mr. Young. | Mr. Young explained that his favorite video game is Star Wars for X-Box. He stated that he finished the 3rd level last night and his goal is to finish the 5th level. |
| Do not document your personal feelings or emotions | FSS Nelson completed a home visit with the Lopez family on 4/13/2016. | FSS Nelson arrived at the home of the Nelson family and knocked on the door. Mr. Lopez answered. FSS sat on the couch. I was nervous about the big dog in the room. FSS dreads home visits to the Lopez family. |
| Group similar information together when possible | The Lopez family has a large dog. The family agreed to keep the dog gated or outside during home visits with FSS.    Companion Services were discussed and a UAI assessment was completed. | FSS Mitchell was nervous about the big dog in the home, but the dog was gated into the kitchen and did not come into the room with FSS. FSS Mitchell asked about the services needed by the family. Companion Services were requested. FSS Mitchell felt relieved when Mr. Lopez put the dog in the backyard. |
| Do not include hyperlinks -- the information may change or become unavailable. | The following information was researched from the website WebMD on 5/15/2023 and copied below. | See info on [http://webmd.com](http://webmd.com/) |
| Use spell check; double-check the spelling of names, medications, diagnoses | Dr. Upadaheay confirmed that she prescribed Clonazepam for Mr. Joseph. | Dr. Ujpadhyaiy confirmed that she prescribed Clonsaazepame for Mr. Joseph. |

*Adapted, with permission, from staff training materials, Virginia Beach Department of Human Services, 2016.*