Social Work: writing case records for placement

Case records, an integral part of professional practice, are detailed written representations of particular practice situations which then become part of the processes for achieving the required case outcomes. It is important to develop good recording practices which can maximize efficiency and minimize risk while meeting organisational, professional and medico-legal requirements. Case records play a foundational role within the whole social work context in a number of ways as they are a:

- vital information base for client work
- way of clarifying the case situation for both the practice worker and the client;
- means by which social workers and service users can make visible to others, such as team members, aspects of the social contents of the client’s needs that might otherwise be ignored
- method of promoting opportunities for collaborative responses in health and community service teams
- means of promoting the recognition of good practice
- vital information base for the achievement of consistency in social work intervention

(Healy & Mulholland 2007, p. 68)

A good case record is focused, factual and evidence-based, and provides the primary audience with information they can use to gain a good sense of the situation and make good recommendations for future action. It should provide observations which can lead the audience to form judgements, and be accessible in that the key information is described from a point of view which the audience understand as well as share. It also should be concise by providing the information in the briefest manner consistent with covering the main points. The material should be well ordered and readable. Urgent matters that were raised in the interaction can be identified by detailing any follow-up actions that have been done since then.

(Healy & Mulholland 2007, p. 75)
Methods of case-record taking

Method 1: Topics
Information gathered in a client interview can be used as ‘topic sentences’ in case records. A topic sentence will provide the gist of a particular matter which can be expanded at a later time such as in future team meetings. The ‘topic sentence’ should serve to make the key issues and situational features of the case briefly available to your audience.

Example
This case is about childcare by grandmother. Grandmother is client.

Method 2: Problems
The information can be seen as a set of problems to be solved.

Example
This case is about childcare by grandmother. Problem 1 – money since mother is erratic about providing it. Problem 2 – time of child collection, since mother is often late.

Method 3: Expressed client concerns
This more complex technique may be suitable in those cases where you need to make clear when you are stating the client’s own concerns and when you are providing your own professional judgement of what happened. This requires you to reflect on the moments when the client signals in some way what is being said is important. One way to do this is to note the speech actions used by the client (makes demands, asks questions, requests help, complains, anticipates trouble, cries, etc.). This will reveal client’s concerns and something of their attitudes to the concerns and may help you to judge what should go on record.

Example
Client, grandmother as carer, complained about child’s mother supplying no money and being late. She warned that she could not continue with the childcare unless she was paid.

Note: Your agency may have a preferred format for writing case notes and it will be useful to read through case files.

(Healy & Mulholland 2007, pp. 77-78)

Resource adapted from: