

FREE RESOURCE · PRACTITIONER INSTRUMENT

Structured Workflow Rubric

A self-review and supervision instrument

Use this rubric to evaluate a single piece of documentation against the AOIVSP framework (Attune, Observe, Interpret, Verify, Structure, Protect). It works for self-review before submission, peer review in case conferences, supervision, and external quality assurance.

Time: ~15 minutes per document — about one minute per step to read criteria, one minute per step to score and note evidence.

Scoring: Each step has five criteria scored 0–4 (see legend). Add the five rows for a step subtotal (max 20). Sum the six subtotals for an overall total (max 120). Behavioral anchors are given at levels 0, 2, and 4; infer 1 and 3 between them. Always write a short evidence note so the score is defensible.

0	Not evident	No evidence of this criterion in the document.
1	Emerging	A trace of the criterion appears, but it is faint or inconsistent.
2	Developing	The criterion is partially met; gaps remain a supervisor would flag.
3	Strong	The criterion is clearly met across most of the document.
4	Exemplary	The criterion is met fully and could serve as a training example.

Document and reviewer details

Reviewer name	Reviewer role (self / peer / supervisor / external)
Date reviewed	Document being reviewed (type + date of document)
Documentation context (program, setting, population)	Total time spent reviewing

STEP 1 OF 6 · ATTUNE

ATTUNE: Regulate first. Then write.

Purpose — Create enough emotional safety and clarity that the documentation reflects reality, not rush or reactivity.

Purpose named	No statement of why the encounter or note exists.		A purpose is implied but not stated plainly at the top.		Opens with one clear sentence naming the purpose of the encounter or the note.	
Tone is regulated	Language is rushed, sarcastic, alarmed, or punitive.		Tone is mostly neutral; one or two heated word choices remain.		Tone is calm and even throughout; word choices are measured, not reactive.	
Pace cues visible	No sign that the writer paused or slowed; the note reads as one fast stream.		Some pacing is evident (a break, a check-in noted) but uneven.		Pauses, check-ins, or pacing offers ("we can go slowly") are documented where relevant.	
Writer state acknowledged	No acknowledgement of writer state or context that may have shaped the note.		Writer state hinted at but not directly named.		Writer notes own state (rushed, tired, affected) where it could shape interpretation.	
Intention for the note	Note feels reactive; no sign of intent re: accuracy, fairness, kindness.		Intent is partly visible (e.g., accurate but not kind, or kind but vague).		Note clearly aims to be accurate, fair, and kind to a future reader.	

Evidence (quote or paraphrase from the document)

Step 1 subtotal: _____ / 20

STEP 2 OF 6 · OBSERVE

OBSERVE: Describe what happened, not what you think it means.

Purpose — Capture concrete facts and sensory detail before layering on interpretation.

Anchored in time and place	Date, time, setting, or who was present is missing.		Some anchors present, others vague ("earlier this week", "in the room").		Date, time, setting, and who was present are stated precisely up front.
Concrete behavior described	Note relies on labels ("aggressive", "oppositional") instead of behavior.		Mix of behavioral description and characterizing labels.		Behaviors are described in observable terms a stranger could picture.
Exact words captured	Key statements are paraphrased, summarized, or absent.		Some quoted material, but key statements still paraphrased.		Important statements appear in quotation marks, attributed to the speaker.
Behavior separated from character	Character judgments stand in for behavior ("she is dramatic").		Character framing appears occasionally alongside behavioral description.		Every behavior is reported as behavior, not as a trait of the person.
Context cues noted	No mention of what else was happening or what preceded the behavior.		Some context noted, but antecedents and others present are inconsistent.		Antecedents, environment, and others present are recorded for key moments.

Evidence (quote or paraphrase from the document)

Step 2 subtotal: _____ / 20

STEP 3 OF 6 · INTERPRET

INTERPRET: Name patterns and possibilities, not verdicts.

Purpose — Use curiosity to connect observations into relational and systemic patterns while staying honest about uncertainty.

Pattern named, not verdict	Interpretation is stated as fact or diagnosis without qualification.		Pattern is named but framed as conclusion more than hypothesis.		Pattern is named and framed as a possibility ("may suggest", "consistent with").	
Behavior linked to context	Behavior is treated as a property of the person, disconnected from setting.		Some links to context made; others left implicit.		Behavior is consistently linked to relationships, triggers, and setting.	
Hypothesis language used	Note uses absolute language ("is", "clearly", "obviously").		Mix of hypothesis language and absolute statements.		Interpretive claims use "may", "one possible explanation", or similar.	
Limits of view named	No acknowledgement of what the writer has not seen or heard.		Limits hinted at but not stated.		Note explicitly names whose perspective is missing and where view is partial.	
No pathologizing shortcuts	Labels like "manipulative" or "non-compliant" appear without behavioral basis.		One or two shortcut labels remain; most are unpacked.		Every potentially pathologizing label is replaced with behavior + context.	

Evidence (quote or paraphrase from the document)

Step 3 subtotal: _____ / 20

STEP 4 OF 6 · VERIFY

VERIFY: Stress-test the story before you lock it in.

Purpose — Make sure what you write is accurate, sourced, and transparent about gaps.

Source of each claim tagged	Key claims appear with no source attribution.		Some claims are sourced; others stand alone.		Every key claim is tagged ("per caregiver", "observed directly", "per record").
Evidence is pointable-to	No dates, frequencies, or specifics that could be re-located.		Some evidence specific; other claims rely on general impressions.		Dates, frequencies, examples, or records are cited for each key claim.
Missing voices and gaps named	No mention of who has not been heard or what has not been checked.		Some gaps named; others smoothed over.		Note states whose voice is missing and what records are still to be checked.
Uncertainty flagged, not smoothed	Conflicting accounts are resolved silently in the writer's favor.		Conflicts noted but minimized.		Conflicting accounts and unverified statements are flagged plainly.
Concrete next step for verification	No next step proposed where one is clearly needed.		A vague next step appears ("follow up").		Specific next step named ("will request X from Y by [date]").

Evidence (quote or paraphrase from the document)

Step 4 subtotal: _____ / 20

STEP 5 OF 6 · STRUCTURE

STRUCTURE: Give the information a shape that others can use.

Purpose — Arrange observations, interpretations, and evidence into a clear container: timeline, summary, or decision pathway.

Container fits the purpose	No clear form; reads as one undifferentiated block.		A container is used but does not match the content (e.g., thematic where chronology is needed).		Chronological, thematic, or decision-brief form is chosen to fit the content.	
Consistent headings used	No headings or inconsistent labels.		Some headings used; structure is partial.		Headings (Context / Observations / Voice / Interpretation / Actions / Next Steps) used consistently.	
Lead with most important thing	Reader must hunt for the point of the note.		Main point is present but buried in the middle or end.		First sentence states what this note documents and why it matters.	
Timeline is readable	Dates are scattered or absent; sequence is unclear.		Timeline present but mixed with prose; hard to scan.		Key dates appear in one line each, in order, easy to scan.	
Actions and next steps are scannable	Actions buried in paragraphs; reader cannot find them quickly.		Some actions in bullets, others in prose.		Actions and next steps appear as bullets a busy reader can scan in seconds.	

Evidence (quote or paraphrase from the document)

Step 5 subtotal: _____ / 20

STEP 6 OF 6 · PROTECT

PROTECT: Write as if the person will read this one day.

Purpose — Ensure the record safeguards dignity, minimizes harm, and reflects an ethic of care, not just compliance.

Future-read test applied	No sign the writer considered how a future reader would experience the note.		Some passages would land safely; others would sting or confuse.		Reads as if the youth at 25, the caregiver, or a new worker could read it with dignity.	
Shaming or blaming language removed	Labels ("dramatic", "non-engaging") stand in for behavior.		One or two labels remain; most replaced with behavior + context.		All labels replaced with behavior + context; no shaming or blaming language.	
Non-essential traumatic detail redacted	Graphic detail appears without a safety, treatment, or legal reason.		Some detail trimmed; some lingers without clear necessity.		Graphic detail included only when needed for safety, treatment, or legal purposes.	
Strengths and efforts named	Note contains only risks, deficits, or problems.		One strength noted but framed faintly or in passing.		At least one concrete strength, effort, or act of care is documented.	
Names, pronouns, and supports respected	Preferred names or pronouns ignored; supports omitted; identity disclosed unnecessarily.		Names and pronouns mostly correct; supports listed thinly.		Preferred names and pronouns used; community, cultural, and family supports named.	

Evidence (quote or paraphrase from the document)

Step 6 subtotal: _____ / 20

SUMMARY · TOTAL SCORE AND NEXT ACTIONS

Summary and action page

Transfer each subtotal from the step pages, sum the total, and write the three short reflections.

1. ATTUNE	/ 20		
2. OBSERVE	/ 20		
3. INTERPRET	/ 20		
4. VERIFY	/ 20		
5. STRUCTURE	/ 20		
6. PROTECT	/ 20		
TOTAL	/ 120		

Strengths observed in this document

Risks or gaps to address

Next actions before this document is finalized or filed

Reviewer signature

Date