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More Clarity and Better Evidence with a Structured Workflow

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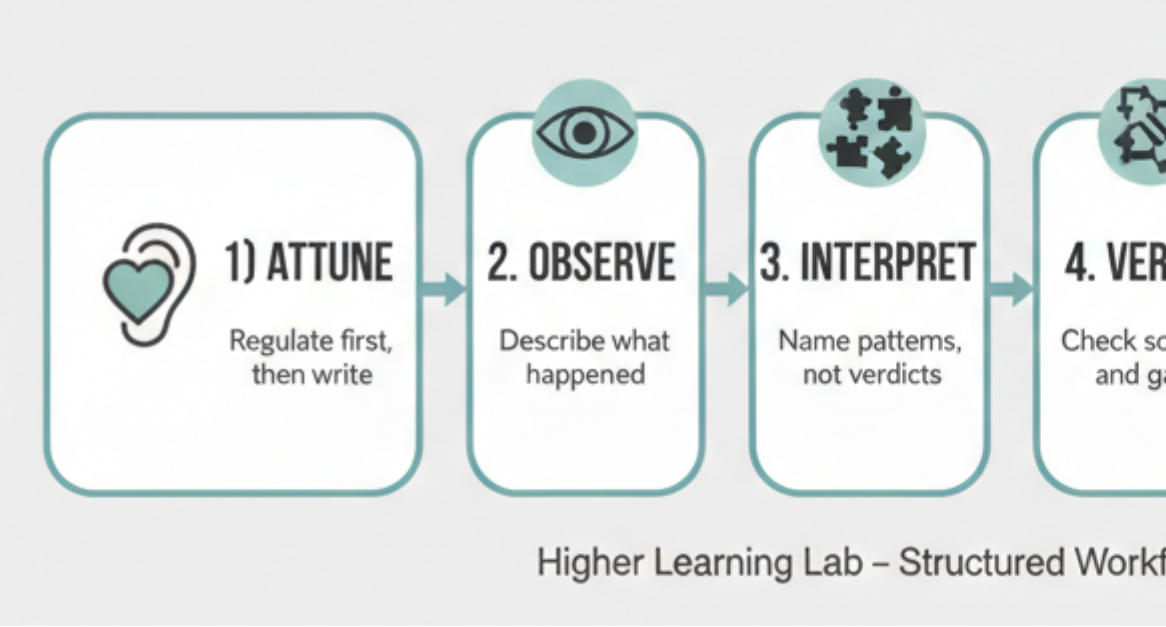
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By far our most popular resource for teams that must document cases, our structured workflow transforms deep listening into ethical documentation, emotional intensity into accountability, and illusion into clear-seeing—so human truth can be protected, structured, and made usable.

A structured documentation workflow protects you and the people you serve.

Youth-related documentation can be heavy: one paragraph can affect services, safety, funding, and how a young person sees themselves years from now.

This resource offers an **intuitive, yet structured workflow** you can run quietly in your mind every time you document an encounter, conduct an interview, or write a report:



It doesn't replace your agency policies, legal standards, or specialised frameworks (like PHR, MIRRA, social-work documentation guides, etc.). Instead, it gives you **a shared way of thinking** that can integrate with all of your team and the existing frameworks.

Downloads

- Executive Brief (PDF)
- Infographic (PDF)
- Rubric (PDF)

How to Use This Resource

- **Before or after** any encounter with a child, youth, student, or family.
- **Whenever you write**: case notes, interview notes, clinical notes, school records, incident reports, learning or evaluation summaries, and grant reports.
- **Alone or as a team**: in supervision, debriefs, case reviews, or multi-agency meetings.

Instructions: Skim the whole post once to get an overview of the structured workflow. Then, in practice, aim for a 1–3 minute mental run-through of each step.

Overview: Structured Workflow for Documentation

- **ATTUNE** – Pause, name the purpose, set a calm pace.
- **OBSERVE** – Describe what you saw/heard with time, place, and concrete behaviour.
- **INTERPRET** – Name patterns and possibilities using "may suggest…"; admit what you don't know.
- **VERIFY** – Tag sources, check evidence, and note what's missing.
- **STRUCTURE** – Use clear headings and timelines so others can follow.
- **PROTECT** – Run the future-read test; remove shaming language; highlight strengths.

This resource about a structured workflow for documentation is meant to be light enough to remember and strong enough to protect both you and the people you serve, no matter which standards or frameworks you may also need to follow.

Step 1. ATTUNE

Structured workflow micro skill: *Regulate first. Then write.*

Goal:
Create enough emotional safety and clarity that your documentation reflects reality, not rush or reactivity.

Micro-steps: Before and during the encounter

1. **Pause your body.**
    - Take one slow breath before you start.
    - Drop your shoulders; notice your feet on the floor.
2. **Name the purpose out loud.**
    - "I want to understand what happened today so we can support you better."
    - "I need to take notes so I can remember what you're saying accurately."
3. **Name the emotional tone.**
    - "This sounds really upsetting; we can go slowly."
    - "I can see this is frustrating—let's take it piece by piece."
4. **Set a regulating pace.**
    - Offer: "Would you like to start at the beginning, or with the part that feels most important?"
    - Give permission to pause: "You can stop or take a break any time."
5. **Ask about how the record might be used.**
    - "What I write may be read by other team members / a judge / your teacher. Is there anything you want me to be especially careful about?"

Micro-steps: Before documenting

1. **Check your own state.**
    - Ask: "Am I rushing? Am I angry, scared, or exhausted?"
    - If yes, note it and slow down. Even 30 seconds helps.
2. **Set an intention for the note.**
    - "This note should be accurate, fair, and kind."
    - "I want this to make sense to [child / caregiver / colleague] if they read it later."

Step 2. OBSERVE

Structured workflow micro skill: *Describe what happened, not what you think it means.*

Goal:
Capture concrete facts and sensory detail before layering on interpretation.

Micro-steps while taking notes

1. **Anchor in time and place.**
    - Start with: *date, time, setting, who was present.*
    - Example: “On 9 April 2026 at 9:32 a.m. in the classroom…”
2. **Write two purely descriptive sentences.**
    - Focus on what you saw/heard, not why it happened.
    - “The child covered her ears and moved under the desk when the alarm sounded.”
    - NOT: “She overreacted to the alarm.”
3. **Capture exact words when important.**
    - Use quotation marks for key phrases:
        - The youth said, “No one listens to me when I say I’m not safe.”
4. **Separate behaviour from character.**
    - “He hit the table with his fist” vs. “He is aggressive.”
    - “She did not respond to three questions” vs. “She is oppositional.”
5. **Note context cues.**
    - Who else was in the room?
    - What just happened before the behaviour (e.g., raised voice, transition, phone call)?

Quick self-check

Before moving on:

- Have I written **what happened** instead of **what I think it means**?
- Could someone who wasn’t there picture the scene?

Step 3. INTERPRET

Structured workflow micro skill: *Name patterns and possibilities, not verdicts.*

Goal:
Use curiosity to connect observations into relational and systemic patterns, while staying honest about uncertainty.

Micro-steps

1. **Ask: "What pattern am I noticing?"**
    - "This reaction appears whenever an adult raises their voice."
    - "Absences increase in the week after visitation changes."
2. **Link behaviour to relationships and context.**
    - "The student became quiet after the teacher mentioned grades."
    - "The caregiver's distress escalated when finances were discussed."
3. **Write interpretations as hypotheses.**
    - Use language like:
        - "This may suggest…"
        - "This pattern is consistent with…"
        - "One possible explanation is…"
4. **Name the limits of your view.**
    - "I have not yet heard the caregiver's perspective on this incident."
    - "I have only observed this pattern in school; I do not know what happens at home."
5. **Avoid pathologising shortcuts.**
    - Swap: "manipulative" → "uses threats of self-harm when feeling abandoned."
    - Swap: "non-compliant" → "has not attended sessions for the past three weeks."

Quick self-check

- Am I **inviting inquiry**, or **closing down the story**?
- Could someone reading this tell what is observation vs. interpretation?

Step 4. VERIFY

Structured workflow micro skill: *Stress-test the story before you lock it in.*

Goal:
Make sure what you write is accurate, sourced, and transparent about gaps.

The three-question test

Run this silently on any key claim:

1. **What is the source?**
    - "Child report"
    - "Teacher observation"
    - "Police record"
    - "My direct observation"
2. **What is the evidence?**
    - Do I have: dates, frequency, examples, documents, photos, logs?
    - Can I point to where this came from if questioned?
3. **What is missing?**
    - Whose voice isn't here yet (child, parent, second carer, other professionals)?
    - Are there relevant records I haven't checked?

Micro-steps in your note

1. **Tag statements with their source.**
    - "According to the caregiver…"
    - "Per school attendance records…"
    - "Observed directly during session."
2. **Flag uncertainties instead of smoothing them over.**
    - "There are conflicting accounts of the incident; further clarification is needed."
    - "The youth's account cannot be independently verified at this time."
3. **Add one concrete next step when needed.**
    - "Will request records from…"
    - "Plan to speak with [role] before finalising assessment."

Quick self-check

- If this note is questioned in court, supervision, or an audit, can I clearly say:
    - where each key claim came from, and
    - what I did *not* know at the time?

Step 5. STRUCTURE

Structured workflow micro skill: *Give the information a shape that others can use.*

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

Micro-steps

1. **Choose the right container.**
    - **Chronological note** – when sequence matters (incidents, crises).
    - **Thematic summary** – when patterns matter (attendance, triggers).
    - **Decision brief** – when a decision is due (placement, safety, services).
2. **Use consistent headings.**
    - Example headings for a case note or report:
        - "Context"
        - "Observations"
        - "Youth/Caregiver Voice"
        - "Interpretation / Working Hypotheses"
        - "Actions Taken"
        - "Next Steps"
3. **Put the most important thing near the top.**
    - One clear opening sentence:
        - "Today's visit focused on safety concerns during transitions between homes."
        - "This note documents a new disclosure of self-harm."
4. **Make timelines readable.**
    - One line per key date:
        - "2026-04-09 – Fire alarm; child hid under desk; described heart racing."
        - "2026-04-16 – Follow-up; child reported ongoing fear of loud noises."
5. **Use bullets for actions and next steps.**
    - Easier to scan, especially for busy teams and funders.

Quick self-check

- Could someone who sees only **this note** understand:
    - what happened,
    - what it might mean, and
    - what we're doing about it?

Step 6. PROTECT

Structured workflow micro skill: *Write as if the child, youth, or caregiver will read this one day*.

Goal:
Ensure the record safeguards dignity, minimises harm, and reflects an ethic of care—not just compliance.

Micro-steps: the "future-read test"

1. **Imagine a future reader.**
    - The youth at 25.
    - The caregiver in a review meeting.
    - A new worker trying to understand the history.
2. **Scan for shaming or blaming language.**
    - Replace labels with behaviours and contexts:
        - "She is dramatic" → "She cried loudly and repeated that no one believed her."
        - "Non-engaging parent" → "The parent has missed the last three appointments; barriers are not yet known."
3. **Redact non-essential traumatic detail.**
    - Ask: "Is this detail necessary for safety, treatment, or legal reasons?"
    - If not, summarise without graphic content.
4. **Highlight strengths and efforts.**
    - Add at least one sentence about resilience, attempts, or care:
        - "Despite conflict, both caregivers attended the meeting and expressed concern for the child's wellbeing."
        - "The youth has consistently asked for help when feeling unsafe."
5. **Check pronouns and names.**
    - Respect preferred names and pronouns as allowed by policy and safety.
    - Avoid unnecessary outing of identity in shared records.
6. **Note supports, not just risks.**
    - Include community, cultural, and family supports that matter to the child.

Quick self-check

- If the person this record is about read it tomorrow or in ten years, would they:
    - recognize themselves,
    - understand what was written, and
    - feel at least *respected*, even if they disagreed?

Putting It All Together: A One-Minute Mental Checklist for a Structured Workflow

Before you finalize any important note or report, run this quick internal checklist:

1. **ATTUNE** – Did I pause and name the purpose? Is my tone regulated?
2. **OBSERVE** – Have I clearly described what happened, with time, place, and concrete behaviours?
3. **INTERPRET** – Have I framed meaning as hypotheses, not verdicts, and named my limits?
4. **VERIFY** – Have I tagged sources, noted gaps, named confusions, and avoided smoothing over uncertainty?
5. **STRUCTURE** – Is the information organized so others can quickly see context, patterns, and next steps?
6. **PROTECT** – If this person reads this later, will it protect their dignity and my own integrity?

You can copy this structured workflow checklist into your notebook, case-management system, or as a printed card in your notes app or near your desk.