

## SD - Support Coordination - Journal Note Guidelines

Journals should be:

- Timely, **within no more than 5 days of the contact**
- Factual
- Clear, **with full names and no acronyms**
- Concise
- Written in the third person
- Non judgemental
- No personal opinions
- Remember the intention of the note - why are you writing it?
- It needs to make sense to someone who doesn't know the client
- It needs to stand up in court or in front of Quality and Safeguards Commission or our auditing bodies
- It needs to contain enough information to make sense to the reader

Journal notes should be written after EVERY contact with a participant or any contact that relates to a participant.

This includes phone calls, visits, meetings, emails, photos (if appropriate, i.e. showing a person working towards their goals with a support worker).

Journal notes show the work that is being done with a person and justify the funds Headway is being paid as Support Coordinator.

### Sample 1 (this journal note does not meet standards)

Rang Bob

Today I rang Bob, he told me he didn't want to have an OT assessment, he just wanted to get his new scooter. He really doesn't understand NDIS and I'm sick of explaining it to him. He was really grumpy on the phone and I think he's drinking too much alcohol. Query alcoholism? I'm going to tell the OT to look out because he can be grumpy and I think he drinks.

### Sample 2 (this journal note is a clear factual outline of what happened)

P/C to Bob re Occupational Therapy (OT) assessment for scooter

The writer rang Bob who said he didn't want to have an OT assessment to apply for a scooter. Writer advised Bob that under NDIS to apply for a scooter you need an OT assessment, report and quotes. Writer discussed the process with Bob and reiterated that although it did take extra time it was needed under the NDIS rules.

Bob stated very loudly that "the NDIS can go jump, I'm sick of them" and advised the writer he wasn't happy with the NDIS process at all. Bob at times appeared to slur his words a little. Writer discussed the process with Bob until he advised he understood the OT assessment was necessary.

Writer asked if Bob was ok, he said he was fine, just frustrated. Writer advised Bob could call if he needed to discuss further and writer would talk to OT as well.

Writer to advise the OT that Bob may be a little nervous about the lengthy process.

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### Sample 3 (this journal note does not meet standards)

Rang lots of places to find a speech therapist for Jill – some had long waiting lists, some weren't taking referrals. I couldn't find one that didn't have a really long wait, will keep trying next week.

### Sample 4 (this journal note is a clear factual outline of what happened and should someone else read this it is clear what services have been tried)

P/C to the following speech therapy providers for Jill

- LaLa Speech in Sale – waiting list 6 months
- Saxons Speech in Maffra – not taking new referrals
- Bedford Lane Speech in Sale – not taking new referrals
- Santa Monica Boulevard Speech in Stratford – 4 month wait

P/C to Jill – advised timelines for above speech therapists, Jill said this was too long and asked writer to keep looking and get back to Jill with any further possibilities.

### **How To Enter A Journal Note**

Journal notes should be added via the “Activity” tab on supportability and linked to the month in which the contact occurred.

The title should clearly describe what the note is about – this helps in later searches through Journals to find a particular note.

Always remember to save your journals before exiting the screen otherwise you will lose the note entirely.

You are able to link up to 3 documents to a journal note by selecting the drop down activities on the left hand side of the screen.

You are able to link journal notes directly to Goals to show progress.

Ensure you put the correct date of the contact on the journal note before saving.

Reports will be run each month to ensure there are adequate notes on each client you are working with to justify progress and billing.