SD - Support Coordination - Journal Note Guidelines

1. **Timeliness:** Write the note within 5 days of the contact.
2. **Factual:** Include only facts, no opinions.
3. **Clarity:** Use full names, avoid acronyms, and be clear.
4. **Conciseness:** Be brief but informative.
5. **Third Person:** Write from a neutral perspective.
6. **Non-Judgmental:** Avoid making judgments about the participant.
7. **Purpose:** Be clear on why you're writing the note.
8. **Understandable:** Ensure someone unfamiliar with the client can understand the note.
9. **Professional Standards:** Ensure the note can stand up in court or audits.
10. **Comprehensive:** Include enough detail for clarity.

Journal Note Guidelines:

- **Document Every Contact:** Include phone calls, meetings, emails, and relevant photos.
- **Show Work and Justify Funds:** Demonstrate the support provided and why funds are used.

Examples:

- **Poor Note Example:** Contains personal opinions and judgments and lacks clear details.

  <u>Example (this journal note does not meet standards)</u>
  Phone Call with Bob About OT Assessment for Scooter
  I rang lots of places to find an Occupational Therapist (OT) for Bob – some had long waiting lists, and some weren't taking referrals. I couldn't find one that didn't have a long wait, I will keep trying next week.

- **Good Note Example:** Provides a clear, factual account of the interaction, including the discussion and next steps.

  <u>Example (this journal note is a clear factual outline of what happened)</u>
  Phone Call with Bob About OT Assessment for Scooter
- **Date/Time:** [Insert Date/Time]
- **Contact:** Bob

  Summary:
- I called Bob to discuss getting an Occupational Therapist (OT) assessment for his scooter.
- Bob said he didn't want the OT assessment but wanted the scooter.
- I explained that, according to NDIS rules, he needs an OT assessment, a report, and quotes to get the scooter.
- Bob was very frustrated and said, "The NDIS can go jump; I'm sick of them." He seemed to be having trouble speaking clearly at times.
- I kept explaining the process until Bob understood that the OT assessment is required.
- I asked if Bob was okay, and he said he was just frustrated, not upset.
- I told Bob he could call me if he had more questions. I will also inform the OT that Bob might be nervous about the process.

  Action:
- I will inform the OT that Bob might be anxious about the assessment process.

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Specifics to Include:

- **Contact Details:** Date, time, and nature of contact.
- **Outcome:** What was discussed, agreed upon, or any action taken.
- **Follow-up:** Any next steps or additional actions required.

This approach ensures your journal notes are professional, objective, and valuable for anyone reviewing them.

How to Enter a Journal Note

1. **Log in to the Therapist Portal:**
   - Go to the client page and click “Record Session.”
2. **Fill in Details:**
   - **Date & Time:** Select when the session occurred.
   - **Service Tab:** Choose “SUPPORT - Coordination of Supports.”
   - **Consult Time:** Enter the duration of the activity (e.g., 1 hour for a Zoom meeting).
3. **Billing Status:**
   - **Billable:** Ensure the box is ticked green for all notes unless the activity is “non-billable” (e.g., administrative tasks). If non-billable, untick the box.
4. **Title:**
   - Provide a clear description of the note to make it easy to search later.
5. **Save Your Note:**
   - Click “Save” before exiting to avoid losing your entry.
6. **Attach Documents:**
   - Use ‘Choose Files’ at the bottom left to link multiple documents if needed.
7. **Editing Restrictions:**
   - Notes can’t be edited once signed off for billing (every 2 weeks) and can only be edited by the original author.
8. **Admin & Travel Times:**
   - Do not add anything to the admin or travel times sections. Include claimable travel time in the consult time bar.
9. **Monitor Support Coordination Balance:**
   - Check the Support Coordination balance and plan usage to avoid overspending or underspending. Consult your manager if there are issues.