

How notes and records may be used

The notes / records will help:

1. To provide a record for the purpose of establishing continuity of evidence, the audit trail
2. To provide evidence of facts and the basis for opinions
3. To provide the basis for showing how and why decisions and recommendations were reached or made e.g.-
 - Why a plan of action was recommended
 - Why certain follow up actions were recommended
4. To refresh the memory of the person preparing a report
5. To refresh the memory in any subsequent legal proceedings

Notes in general- Best practice

Think **CIA**- **C**lear, **I**ntelligible and **A**ccurate.

Always record in the notebook, daybook or telephone book

Use numbered pages, make notes in permanent ink and write contemporaneously

Use separate notes for separate incidents

Include date, time, place and people

Record times of all key of incidents / events in a chronological order

Cover all relevant facts

Make no assumptions, comments or opinions

Sign and date the bottom of every page

Initial all crossings out / mistakes

Check for mistakes immediately

Never return to notes and improve them at a later date

Use clear plain language and correct grammatical English

Keep notes safe and secure

Maintain a proper filing system for notes (10 years)

Act no **ELBOW**, i.e.:

No **E**rasures- do not cross out large portions of text so they become illegible

No **L**eaves torn out

No **B**lank spaces or if there are, rule them out

No **O**verwriting

No **W**riting in the margins (except dates, times and/or initials)