

Co-created Case Notes

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Why do we need notes?

Notes are written to meet **system needs**:

- Accountability and quality
- Legal requirements
- Practice history for worker/s
- Care coordination / handover / referral

Imagine...co-created notes

But imagine if notes were also there to directly and explicitly serve the **needs of the person?**

Notes can become a recovery tool for the person. They could exist to serve the person's needs, not just the service.

Ways of co-creating

- ▲ Both parties are equally active contributors
- ▲ The person can freely add to the content
- ▲ The person has a say in what's written: it's discussed before writing
- ▲ The person gets a copy of notes
- ▲ The person's told what's written about them

Types of co-creation

1. Each person writes notes. They're shared, discussed and both included. Each person gets a copy.
2. An entry is discussed and agreed together.
3. The worker writes the entry but shares it with the person, who can then suggest changes.
4. The worker writes the notes after the meeting, but sends a copy to the person, or gives them a copy at the next meeting

The processes of recovery

Co-created notes can contribute to being recovery-oriented:

- **Connectedness:** *we work together, we share*
- **Hope:** *you show me that you think I have the capacity to speak for myself*
- **Identity:** *what I say matters, I matter*
- **Meaning:** *I can make more sense of what's happening when I have a record*
- **Empowerment:** *I have more control*

Organisation benefits

- **Efficient use of time:** Increased contact hours
- **Effectiveness:** notes are more likely to be accurate when based on conversation rather than observation & assumption
- **Relationships:** Likelihood of better relationships & recovery outcomes

Individual benefits

- I trust my worker more if:
 - *you don't think you know better than me*
 - *you don't make assumptions about me without me*
 - *you show me that what I think matters*
- I feel more empowered when:
 - *I have a say and my views matter*
 - *You encourage me to disagree and explore ideas*
- Co-created notes can help me to remember what we did in a meeting
 - *What we discussed*
 - *How I was feeling*
 - *Discussions about treatment*
- I get more ongoing benefit from our meetings when:
 - *I can re-read my notes between meetings, and think about it some more, and even add more ideas or questions*
- I can get a big picture of our work together over time:
 - *It becomes my record of our work together, like a shared journal.*
 - *I can look back on where I've been, what I've done, and where I am now.*

Common worker objections

But what if I have to write something the person finds offensive?

Why would you do that anyway? If you're not willing to discuss it with the person, you shouldn't write it.

We don't have time.

Actually, this can save you time in the long term because you will have a better understanding of the person and their needs

PS: Please don't call them 'case' notes. We're people, not cases.