



Case Documentation and Report Writing Tips

How To Use:

This tool allows APS professionals to practice and polish their documentation skills using a collateral interview from a video clip.

It is divided into 3 activities that the learner will complete after watching the following video - [Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview - YouTube](#) (runtime 07:35).

1. Part One: Record facts and observations you see and document inferences and interpretations.
2. Part Two: Write a Collateral Contact Narrative using clear, factual, objective, and concise language and capturing direct quotes.
3. Part Three: Answer supplemental questions.

Additional Video Resource:

[Caregiver Neglect Allegation, Home Visit: Alleged Perpetrator Interview - YouTube](#)



PART ONE

Using the video [Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview - YouTube](#), think about whether the impressions you are receiving are facts, observations, inferences or interpretations. Make notes below for each category.

1. What are the **facts**?
 - **Facts** – something that actually exists; reality; truth. *Information that can be verified.*
2. What are your **observations** (appearance, behaviors, conversations, etc.)?
 - **Observations** – an act or instance of noticing or perceiving, an act or instance of regarding attentively or watching. *Things you may see, hear, or smell.*
3. Further investigation is still needed, but what can you **infer** from the video thus far?
 - **Infer** – To derive by reasoning; conclude or judge from premises or evidence: (of facts, circumstances, statements, etc.)
4. Further investigation is still needed, but did you make any **interpretations** based on what you saw?
 - **Interpretations** – a conception of another's behavior. *Combination of facts, observations and inferences and what this means to the APS professional, i.e., a professional opinion.*



PART TWO

Using the video [Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview - YouTube](#), write a collateral contact narrative.

Consider the elements of good report writing:

1. *Accurate, factual, complete, and timely documentation.*
2. *Inclusion of direct quotes.*
3. *Clear, concise, and objective language that will stand up in court, and provide a professional standard for APS casework.*

Narrative:



Narrative (continued):

Next, review your narrative to see if you included following documentation essentials included:

- The date the narrative was written.
- Setting/location/people present
- Name of older adult, alleged perpetrator and others involved in the case.
- Statements made about the allegation or protective issue.
- Proper use of abbreviations
- Direct quotes, with context (the questions and the answers)
- Observations including witness' physical and emotional demeanor.
- Clear language
- Objectivity



PART THREE

Using the video [Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview - YouTube](#), discuss or answer the following questions:

1. What questions did the APS professional use that demonstrated objective interviewing skills?
2. In what ways did the APS professional ask the Alleged Perpetrator to clarify an answer?
3. What would you document about the environment, e.g. what you saw/heard/smelled?
4. Based on the interview, what documents would you attempt to secure and include in your case record?