Creating a Useful Note

Why document?

The primary purpose of documentation is to support the continuity and quality of care. This helps keep the client motivated and encouraged and allows her to connect with the WIC staff. It's this connection that allows us to provide the best care, tailored to the client's individual needs.

A useful note communicates important information to all staff members, including the client's history, needs, and concerns, as well as items for follow-up. Documentation also records referrals which help with the client's continued care. There may be aspects of the client's care that need to be assigned to team members with specific skills, such as a Registered Dietitian (RD) or International Board Certified Lactation Consultant (IBCLC).

Who cares about your documentation?

Your documentation may be read by a number of different people, including:

- Your coworkers and supervisors
- State and/or Federal auditors
- Quality improvement personnel
- Lawyers and judges
- WIC Participants

What types of documentation do you use?

You will use HANDS to document client information. In addition, for a certification or nutrition education visit, you will complete an Arizona WIC TGIF note. Some aspects of the TGIF note include:

T (Tool): Getting to the Heart of the Matter Tool used, if applicable.

G (Goals): Personal goals or areas of improvement that are identified by client.

I (Information): Information related to the client's knowledge, feelings, motivations, and challenges with various topics. These may include breastfeeding, health, growth, and nutrition. Nutrition education topics are discussed and handouts provided. Any information that is relevant to the visit or that helps other staff members provide quality care falls into this category, along with details about any new risk factors that were identified.

F (Follow-up): Areas to follow-up with at subsequent visits.

Check your policies and procedures for more information on TGIF, and other, notes.

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Tips for Creating a Useful Note

- **Keep Notes Timely:** Document while the information is fresh in your memory, so no inaccurate information is passed along.
- **Respect Client Privacy:** Don't include names of people other than the client; this includes Authorized Representatives, and Proxies. This is especially important for foster families. Never include Social Security, insurance, or ID information in your note.
- **Remember That Other People Will View The Note:** Keep your note clear and professional, with details that allow the next staff member to quickly pick up where you left off. Be sure that the note is written so that it wouldn't be seen as offensive if a client's family member read it.
- **Keep it Professional:** Use statements that specifically describe client actions and maintain a formal voice.
- **Use Standard Abbreviations:** Stick to approved WIC and medical abbreviations that are familiar to other staff members.
- **Be Accurate and Error Free:** Proofread your note and use spell-check before saving.
- **Keep It Simple:** Focus on specific, relevant information. Give precise details without being overly wordy.
- **Include Adequate Details:** Include information that is needed to explain nutrition education, referrals, and follow-up care.
- **Ignore Trivial Information:** Make sure everything in your note is directly related to the client's nutrition or health status. Exclude information that doesn't relate to client care.
- **Note Important Client Communication:** Include important statements from the client and/or Authorized Representative. Designate these statements with quotation marks.
- **Avoid Biased Phrasing:** Use neutral statements that give specific information without being judgmental.
- **Remain Objective:** Avoid noting your subjective comments or giving your own opinion of the client's statements, history, concerns, and needs.
- **Never Enter Derogatory Statements about a Client:** Always convey respect and concern for the client, regardless of history, diagnoses, and nutrition status.
- **Exclude Complaints About Other Staff Members:** Supervisors, or other appropriate staff members, should handle customer complaints. These issues do not belong in a client's notes.