

# **Telling the Story Well: Purpose + Principles for Ethical, Trauma-Informed Documentation**

Presented by: Leah Seligman, MA, LCPC

---

# Why We Document

- Ethical accountability (per professional standards such as social work codes)
- Agency expectations (program models, supervision, risk management)
- Funding and compliance (e.g., government, grants, insurance)
- Continuity of care (supporting consistent, informed youth support)

# Fundamentals of High-Quality Documentation

- Accuracy and objectivity: Record facts, not judgments.
- Transparency: Write as if youth could read their file.
- Cultural humility: Consider power and positionality in what's written.
- Purposefulness: Document what supports the youth's goals and program accountability.
- Confidentiality and ethics: "Enough to serve, never to expose."

# Purpose Shapes Practice

The purpose of documentation changes the tone, focus, and level of detail

- Think about:
  - Who is the audience? Who will be reading this note?
  - What is the purpose of the note? Why are you writing it?
  - How might these change the depth, focus, or tone?

# The What of Documentation

Bare minimum: Who, Where, When

- Who was present
- Where did it happen
- When did it happen

# The What of Documentation

Other information to document:

- What occurred should be recorded if it makes sense given the purpose of your documentation: Did you review goals, provide psychoeducation, do counseling?

# The What of Documentation

Other information that MUST be documented:

- Suicidality – What you did or didn't do (i.e. hospitalize) and your reasoning
- Law enforcement/DCFS involvement – should be recorded, your response, and your reasoning

# Standard Models of Documentation

---

SOAP & DAP

# SOAP Notes

- S – Subjective report & Symptom description
- O – Objective content
- A – Assessment
- P – Plan

# DAP Notes

- D – Data
- A – Assessment
- P – Plan

# Questions?



- Thank you for your attention and engagement.
- 