

PRACTICE LEARNING HUB

Case Note Checklist

A one-page prompt for clearer, fairer, more useful records. Created by Kayleigh Rose Evans.

Context

- Why did this contact or event happen? Is the purpose clear in the first line?
- Could a colleague picking this up cold understand the situation?

Voice

- Is the person's own voice in the record - their words, views and wishes?
- Would the person recognise themselves if they read this?
- Have I described a person, not just a problem?

Evidence

- Have I separated what I observed from what I was told and what I concluded?
- Is every opinion supported by something observable?

Risk

- Are concerns stated plainly, without euphemism?
- Is it clear what the risk is, to whom, and how it is being managed?

Rationale

- Have I recorded why decisions were made - including decisions not to act?
- Would this rationale stand up if read in six months, or in court?

Next steps

- Is it clear what happens next, by whom, and by when?
- Have I avoided 'will monitor' without saying what, how and when?

The test

Clear enough for a stranger. Fair enough for the person. Strong enough for a court. Kind enough to be read aloud.