

Case Recording: Guidance for Managers and Practitioners

Document Title	Case Recording: Guidance for Managers and Practitioners
Version	2.0
Authors	Nik Flavell, Senior Manager for Adopt North East
Owner	Nik Flavell, Senior Manager for Adopt North East
Date Approved	13 January 2025
Date to be Reviewed By	31 January 2026

Adopters, those Adopted and those affected by Adoption should be able to understand all the things written about them by the Agency

What is the purpose of case recording?

- Case recording should tell the reader what's happening ***right now***
- Case recording should help inform decisions about ***what should happen next***
- Case recording should help the understanding of the child or person's journey with the Agency – ***what did happen and why***

Who is case recording for?

- Case recording about a child is always ***written for the child***. Whilst many others may read the recording, case recording is primarily for the child in order for the child to understand their story
- Case recording about an adult – an adopter or someone adopted or affected by adoption is always ***written for the adult***. Whilst many others may read the recording, case recording is primarily for the adult in order for the adult to understand their story

How should case recording be written?

- Case recording – whether for a child or an adult – should be written so that it can be reasonably read by a child of ***approximately 10 years of age of average literacy***.
- Case recording should be written in a ***straightforward everyday style***, using the language that the child or adult being written about has or would use – including names, terms and descriptions

- There should be **no use of complex words and phrases, jargon, acronyms or technical terms** that require a professional knowledge-base to understand
- Case recording should be **sensitively written**, avoiding language that could be triggering or cause harm or offence whilst not shying away from clarity in favour of vagueness
- Case recording should **never be casual or rushed** and should avoid abbreviation, slang and social media messaging shorthand.
- Case recording should always be **written with care** – case recording is about real people and real events – how would you want a significant life event about you recorded?

When should case recording be written?

- Case recording should be written **as close in time to the event as possible**
- Case recording should be written **no more than three working days** from the event to avoid loss of accuracy

What should be written in case recording?

- Not everything that happens needs recording – **recording must be relevant** and should not include unnecessary material, messages or notes or duplicate information held elsewhere
- **Caution must be taken in copying case recording** from other documents – recording can lose its context, 'feel out of place' and not add value
- Case recording should put the child or adult being written about at the very centre of the work – case recording **should bring their lived experience to life** and enable it to be clearly understood
- Events should be described in **behavioural terms, facts and opinions clearly differentiated**
- **Description should be accompanied by analysis** – not just what was said or observed but what it meant