



Oregon  
Family Support  
Network

# Documentation for Family Support Specialists

## in BRIEF

Briefs are provided as a best practice reference or topic example to support communities in developing the family partner role.

### INTRODUCTION

Documentation is the way Family Support Specialists show how much of our time is being spent with families. It is how we show the support offered to families, as well as the progress families are making. It is how we demonstrate the real experiences families have, and where we log the collaboration between families, system providers, and partners.

### DOCUMENTATION OVERVIEW

Documentation is not a place where Family Support Specialists (FSS) describe details of the family, or details of what the family is doing. Documentation should always be done in a way that documents the work of the FSS and not the family dynamics. FSS should always be mindful to protect the privacy of the families they are working with and to document only those things that the family wants to have reflected in documentation.

FSS should always be mindful of what may be used against a family if it is taken out of context. Document the necessary facts of your support activity with the family. This can, and should, be done even when we walk with families through difficult situations.

Documentation is a log showing how the FSS is supporting the family. It should highlight the peer practice activities you are doing with the family versus what happened during your time with the family.

### WHAT WE DOCUMENT

Initial Contact with the Family: After identifying the best method of communicating with the family, document when you have made the initial contact. This will show that you have connected with the family in a timely manner. In your data base system add this contact including the date, time and method of contact, along with a sentence referencing what peer practice you provided and next steps.

*Example: I placed a phone call to the family for initial contact. Family didn't answer, so I left a voicemail message explaining who I am and asked them to call me back at a day and time that works best for them.*

The Engagement Process: Activities and support offered during the engagement process should be documented in your agencies data base system. It can be brief as the FSS is just getting to know the family. A templet format is recommended for this type of documentation note.

*Example: Q: Who did you meet with? A: I met with Sue, the Mother. Q: Where did you meet? A: We met at the family home. Q: What was the specific need/connection to the service plan? A: The need is to begin the engagement phase. Q: What support did you provide? A: I described my FSS role to the family. I shared a bit of my story to begin to build trust and mutuality with the family. The family and I reviewed our agencies Welcome Packet. I discussed our grievance/complaint process with the family.*

Family Meetings: When families request the FSS support and presence at a meeting scheduled for the family to attend, this support should be documented in your agency's data base system. Meetings could include, but are not limited to, Wraparound Child and Family Team meetings, IEP or 504 meetings, DHS scheduled meetings, and court

hearings. Documentation should show the support work the FSS is providing vs what the family is saying or doing.

*Example: I accompanied Mom at her request to the IEP meeting scheduled on October 22<sup>nd</sup> from 3 pm to 4 pm. I assisted mom with requesting copies of all documentation, as well as advocated for further clarification of terms and procedures used by the school district that were unclear to Mom.*

When the FSS needs to be absent: Documentation for a FSS absence (vacation, illness, etc) is vital to show that we are continuing to support the family and that they have continued access to peer support. Document your contact with the family and the plan for support while you are unavailable. You do not need to use a templet for this type of note.

*Example: I called Mom to let her know I am going on vacation from 1/1/17 through 1/8/17 and will be back 1/9. I left the family with Jane Jones contact information should they need extra support while I am out. Example: I sent a text to Jim Smith the Case Manager to let him know that I am going to be out on vacation from 1/1/17 through 1/8/17 and will be back 1/9. I let him know that Jane Jones will be providing peer support for the family should they need it and left him her contact information.*

When support is reduced: If, over time, a family doesn't need/desire as much support and we have agreed to reduce our activities or support services with them, we need to document that. If we don't, it looks like the support just slowed down without cause.

*Example: Mom and I had a discussion around the level of support she is needing. Mom explained that now she would like me to call and check in with her once every 2 weeks and attend her scheduled IEP meetings. I explained to Mom that I really honor her for telling me what works best for her family and we would let any necessary support providers know of our plan.*

Correspondence with support providers: Often when we meet with families there is a plan to connect with other family support providers as well. This gets documented in your agencies data system to show follow through with the work we are doing, as well as to show transparency in services provided. Track your time accordingly and document it.

*Example: As Mom and I had discussed in person at her home on May 3<sup>rd</sup> at 9:45 am I called Jim Smith, the Case Manager, and discussed Moms concerns with ongoing transportation challenges. Jim explained that he would be sure to have her concerns/ideas around these transportation challenges on his agenda for the next meeting with her.*

## FORMS OF COMMUNICATION FOR DOCUMENTATION

All forms of communication that FSS's use with families or other family support providers is acceptable and should be documented in your specific agency data base.

Current forms of communication documented are: Email, Face to face, Initial Contact, Phone, Referred, Social Media, Text, Pre-Screen.

Additionally, when FSS are attending meetings by phone such as a family team meeting, IEP meeting, or others this should all be documented as support similar to face-to-face activities. Documentation should also be completed when conferencing, skyping, or any other use of technology as a way of attending meetings in support of the family.

