How to…read case notes

The aim of reading case notes is usually to find out about the client so that you can formulate the next step in their care. You will usually have access to case notes before your initial contact with a client so that you can ensure that first session is appropriate to the client's needs.

Case notes are not a biography and should not be read like a book. They are a contemporaneous record of the client's path through therapy. Consequently you will need to read them backwards! Some files are very thick and because clients progress, change and develop, you usually do not need to read the whole file to gain an accurate picture of the current status.

Step One

- Look for name and date of birth, then work out how old the client is
- Who referred the client, why and when?
- Which other professionals are involved?
- What was the initial diagnosis?

Step Two

Read the last report. This will give you information about the last significant contact with an SLT e.g. assessment details and outcome, intervention aims and outcome.
Look for information that will help you decide which areas to target in assessment and/or intervention and that gives an indication as to the client's ability to benefit from therapy.
Read reports from other professionals. These give you information about the client that you may not get from any other source.

Step Three

Look at the most recent assessments. These will give you ore information about the results quoted in the last report and an indication as to the type of errors the client is making

Step Four

Read the session notes. Start with the most recent entry and read backwards. You are aiming to build a mental picture of what intervention has been carried out and how the client has reacted to it.
Are there any entries that give you an indication as to the functional effects of the client's problems?
How do carers interact with therapy?
How fast or slow is progress and have any approaches been particularly effective?
You only need to read back until you have your picture established.
If the client has had a lot of contact you may want to just skim through the remainder of notes looking for anything that may be significant. Skimming through older reports and letters will yield similar information. Don't spend too much time on this though, it is the client today that you need to focus on.