



# APS Documentation and Report Writing

## Transfer of Learning Tool

Version 1

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We create experiences that transform the heart, mind and practice.

**The test of a good APS Case Record is when any reasonable and prudent person can read and review the record and draw his/her own conclusion as to what occurred, based on interview statements and supportive evidence.**

*-CWDA APS Guidelines to Supplement Regulations, 2.7: Guiding Principles for APS Case Documentation*

### **How To Use:**

This Transfer of Learning Tool is designed as a companion to NAPSA Core Competency Module #15: APS Case Documentation and Report Writing. It allows APS professionals to practice and polish their documentation skills using a collateral interview from a video clip. It can be used in a variety of settings to include:

- Classroom Training with support from a facilitator
- Individual activity to guide documentation
- Coaching tool for Supervisors to use when working with staff around documentation skills
- Unit Meeting as a group activity with guidance from a Supervisor or Lead Staff

This Transfer of Learning Tool is divided into 3 activities that the learner will complete after watching the [Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview video](#).

1. Part One: record facts and observations you see and document inferences and interpretations.
2. Part Two: write a Collateral Contact Narrative using clear, factual, objective and concise language and capturing direct quotes.
3. Part Three: answer supplemental questions.

### **Learning Objectives:**

1. Use a collateral interview video to demonstrate the use of clear, concise and objective language while illustrating accurate recall in a contact narrative.
2. After viewing a collateral interview video, accurately identify and differentiate facts and observations.
3. Use a collateral interview video to identify interview techniques that support objective interview questions and demonstrate clarification techniques.

### **Materials:**

The demonstration video "Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview" can be found at

<https://theacademy.sdsu.edu/programs/apswi/apswi-videos/> or <https://www.youtube.com/watch?v=6i9ARePrPpE>

## PART ONE

Using the Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview, think about whether the impressions you are receiving are facts, observations, inferences or interpretations. Make notes below for each category.

1. What are the **facts**?

- **Facts** – something that actually exists; reality; truth. *Information that can be verified.*

2. What are your **observations** (appearance, behaviors, conversations, etc.)?

- **Observations** – an act or instance of noticing or perceiving, an act or instance of regarding attentively or watching. *Things you may see, hear, or smell.*

3. Further investigation is still needed, but what can you **infer** from the video thus far?

- **Infer** – To derive by reasoning; conclude or judge from premises or evidence: (of facts, circumstances, statements, etc.)

4. Further investigation is still needed, but did you make any **interpretations** based on what you saw?

- **Interpretations** – a conception of another's behavior. *Combination of facts, observations and inferences and what this means to the APS professional, i.e., a professional opinion.*

## PART TWO

Using the Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview, write a collateral contact narrative.

*Consider the elements of good report writing:*

- 1. Accurate, factual, complete, and timely documentation.*
- 2. Inclusion of direct quotes.*
- 3. Clear, concise, and objective language that will stand up in court, and provide a professional standard for APS casework.*

-CWDA APS Guidelines to Supplement Regulations, 2.7: Guiding Principles for APS Case Documentation

Narrative:

Narrative (continued):

## PART TWO (For Facilitator or Supervisor)

Were the following documentation essentials included?:

- *Share specific examples from the written narrative to support these essentials*

- The date the narrative was written
- Setting/location/people present
- Name of Alleged Perpetrator and relationship to victim
- Statements the Alleged Perpetrator made about the allegation or protective issue
- Proper use of abbreviations
- Direct quotes, with context (the questions and the answers)
- Observations including witness' physical and emotional demeanor
- Clear language
- Objectivity



## PART THREE

**Using the Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview, discuss or answer the following questions:**

1. What questions did the APS professional use that demonstrated objective interviewing skills?
2. In what ways did the APS professional ask the Alleged Perpetrator to clarify an answer?
3. What would you document about the environment, e.g. what you saw/heard/smelled?
4. Based on the interview, what documents would you attempt to secure and include in your case record?

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REVOLUTIONIZE  
THE WAY PEOPLE  
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