



 **Records Used In  
Social Work**

Chapter 3

- \*The first and most frequently used approach to teaching practice through recording keeping is the process record.
- \*The second recordkeeping structure is the Teaching/learning record developed by Kagle in 1982

# \*Introduction

- \* The second recordkeeping structure is the Teaching/learning record developed by Kagle in 1982
- \* Using narrative summary rather than process form, the T/L record incorporates far more description of the service transaction and of the process of decision making than does a typical agency record.

## \* Introduction

- \* Using narrative summary rather than process form, the T/L record incorporates far more description of the service transaction and of the process of decision making than does a typical agency record.
- \* The T/L record is intended to facilitate the development of interpersonal and cognitive practice skills along with summary recording skills

# \* Introduction

\*The third recordkeeping structure presented is Essential Recording, also developed by Kagle.

\*In Essential Recording, students audiotape or videotape sessions with clients, providing student and supervisors with direct access to what happened in the service transaction.

# \*Introduction

- \* In Essential Recording, students audiotape or videotape sessions with clients, providing student and supervisors with direct access to what happened in the service transaction.
- \* Using tapes themselves or transcripts made from the tapes, students then prepares summaries of each session.

# \* Introduction

- \* Students then use their session summaries as a resources when they prepare narrative reports for the official agency record.
- \* Essential Recording teaches the student to distill the essence of the client-need-situation and the service transaction for the record. Aids students in:

# \* Introduction

- \* Essential Recording teaches the student to distill the essence of the client-need-situation and the service transaction for the record. Aids students in:
  - \* Developing summary recording skills
  - \* Assist students produce records that are useful to supervision, tapes, transcripts, session summaries and narrative reports are all available for review and use in supervision.

# \* Introduction



- \* As a general rule, records used to teach students practice and recording should not become part of the client's record.

# \* Introduction

- \* A process record is an attempt by the practitioner to reconstruct, as accurately as possible, what transpired in an interview or meeting between worker and client.
- \* It usually takes the form of a script, and includes what the worker and client did and said.

## \* Process Recording

- \*The process record has had an important place in the history of social work.
- \*First used in studying the client and the situation when an important purpose for practice was social investigation, the use of the process record has changed with the development of the profession.

## \* Process Recording

- \* Process recording indicates the manner in which in person appears to relate to himself to another person during the therapeutic experience.
- \* Workers no longer reproduced everything they could remember about the transaction. Rather, they selected specific information to process-record because of its importance in characterizing and individualizing the client, and the summarized the rest.

# \* Process Recording

- \* Today, process recording is seldom used in day to day practice. Records still contain information about the process of service, but it is likely to appear in summary rather than in process form.
- \* The process record is still widely used in social work education.

# \* Process Recording

- \* The process record is still widely used in social work education.
- \* Students may process-record all or portions of their interviews or meeting with clients.
- \* Preparation for process recording requires that students concentrate on what clients say and how they behave throughout the encounter.

# \* Process Recording

- \* The process record is still widely used in social work education.
- \* Preparation for process recording requires that students concentrate on what clients say and how they behave throughout the encounter.
- \* Students must also remember their own statements, feelings, and behaviors, and how they respond to the client.

# \* Process Recording

- \* The process record is still widely used in social work education.
- \* Finally reviewing the written record allows students to develop a better understanding of the client-need-situation, the service encounter, and their own performance.

# \* Process Recording



\*The process record may be used in field instruction to develop students' assessment skills, self-awareness, knowledge of individual and group dynamics, and use of self in the service encounter.

## \*Process Recording

\* Many students and field instructions now supplement process records with special formats for transcribing and responding to brief or extensive verbatim accounts of interactions with clients.

## \* Process Recording

\* Process recording is far too time-consuming to be cost-effective for practitioners in agency or private practice. Process recording is most done with student field work.

\* It is better for the student considering taping or video taping

# \* Process Recording

## Summary

- \* Primary Function: Social work education
- \* Current Usage: Field Instruction

\* **Process Recording**

## Summary

- \*Organizing Rationale: The worker records as completely as possible all or selected portions of the service encounter. The record includes client statements and actions as well as worker statements, action, and feelings.

# \*Process Recording

## Summary

- \*The record may resemble the script of a play or it may be organized into paragraphs, using “I said” and “(client’s name) said.” It is useful to have the record transcribed, leaving a wide margin for comments by the worker and the supervisor.

# \* Process Recording

## Summary

- \*Strengths: The practitioner learns to remember the service transaction in detail. The record is a useful learning tool.
- \*Limitations: It is time-consuming and costly
  - \*It does not teach recording skills needed for agency practice

# \*Process Recording

## Summary

- \* Limitations: It is time-consuming and costly
  - \* It does not teach recording skills needed for agency practice
  - \* It is selective and does not replicate the actual work-client interaction
  - \* It risks client privacy

\* **Process Recording**



\*The T/L Record was developed by Kagle in 1982 to meet special learning needs of social work students in fields' agencies, and to respond to the limitations of process recording in preparing students for agency-based recordkeeping.

# \*The Teaching/Learning (T/L) Record

- \* This information allows the field instructor to collaborate with the student in making decisions about service and to assess and facilitate the student's progress in knowledge and skill development.
- \* As a result, students have the acquisition to practice the recording skills they will use as practitioners.

# \* The Teaching/Learning (T/L) Record

## \*Summary

- \* Primary Function: Social Work Education
- \* Current Usage: Field instruction; field seminar
- \* Organizing Rationale: The student records in narrative summary style following the outline provided (left column).

# \*The Teaching/Learning (T/L) Record

## \*Summary

- \*Organizing Rationale: The student records in narrative summary style following the outline provided (left column). Some teaching/learning issues, relevant for discussion in field supervision or in the field seminar, are also included (right column).

# \*The Teaching/Learning (T/L) Record

## \*Summary

- \*Strength: The student records sufficient information about the process to facilitate the teaching and learning of interpersonal and cognitive practice skills. The student uses the narrative summary style used in many agency records and reports.

# \*The Teaching/Learning (T/L) Record

## Summary

- \* Limitations: Time-consuming and costly. It is also selective and does not actually reproduce the service translation. To study process, the student and instruction should use videotapes and audiotapes. (Exhibit 3.3)

\* The  
Teaching/Learning  
(T/L) Record

- \* Social work students have taped their sessions with clients for more than half a century.
- \* Audiotapes and videotapes of classroom exercises help students model and monitor elementary interview skills
- \* They are also used in teaching and learning

## \* Essential Recording

- \* Supervising advanced clinical practice
- \* Notably family therapy
- \* Audiotapes and videotapes offer practitioners, supervisors, and educators an opportunity to observe practice “in action”
- \* Tapes can also be used to facilitate the development of recordkeeping skills

## \* Essential Recording



\* Essential Recording has many advantages over process recording.

\* Students learn vital summary recording skills and have the opportunity to observe themselves and their clients on tape.

\* Tapes can even be used in the service process (process records are based on what students remember about their interactions with clients).

# \* Essential Recording

- \* Essential Recording includes five or six steps
  - \* The student seeks and is granted permission from the clients to tape sessions
  - \* The student tapes sessions with the client\
  - \* The student transcribes the tapes into a verbatim record. (This step may be omitted).

## \* Essential Recording

- \* The student seeks and is granted permission from the clients to tape sessions
- \* The student tapes sessions with the client\
- \* The student transcribes the tapes into a verbatim record. (This step may be omitted).
- \* The student prepares a session summary for each session, using either an unstructured or a semi structured format (see exhibits 3.6 and 3.7)

## \* Essential Recording

- \* The Student and the supervisor review and discuss the tape or verbatim record and session summary from the perspectives of practice and recording.
- \* The student prepares narrative reports for the official client record using the customary agency format.

## \* Essential Recording

## Summary

- \* Primary Function: Social work education
- \* Current Usage: Field instruction

\* **Essential Recording**

\* Organizing Rationale: This approach combines existing recordkeeping structures in a process in which students produce and review a series of products with the goal of distilling the essence of the case and then presenting this information in well-written narrative reports. Students produce tapes and session summaries prior to preparing the customary agency record.

## \* Essential Recording

\*Strengths: Essential Recording teaches students to describe and analyze the case using the narrative style they will be expected to use as practitioners. The process focuses the student's and supervisor's attention on what actually happens in the service transaction, facilitating the development of cognitive and interpersonal practice as well as recordkeeping skills.

# \*Essential Recording

\* Limitations: The process is time-consuming and may not be suitable in some agencies or with some clients. This limitations may be overcome by using Essential Recording with only one or two of the student's cases. Videotape equipment may be prohibitively expensive, but audiotaping equipment is inexpensive. Tapes may be vulnerable to breaches in confidentiality.

## \* Essential Recording



- \* Records of the transactions between social work students and their clients are an important vehicle for teaching and learning about practice.
- \* Education for recording should take place throughout the educational process: in the classroom, in the field, and in entry-level practice

## \* Improving Education for Recordkeeping

- \* Education for recording should move from generic to specific, that is, from general concepts learned in the classroom to their specific application in fieldwork and entry-level practice.
- \* Skill development should proceed along a continuum

# \* Improving Education for Recordkeeping

\* Education for practice and for recording should be linked and continuous; recording should not be introduced as a necessary evil of agency practice but as an integral part of practice throughout the student's learning experience.

## \* Improving Education for Recordkeeping

\*What has been notably absent from the experience of most current and recent students has been:

\*The classroom (or generic) component of the classroom-field-practice sequence

\*A well-convinced continuum of skill acquisition and development

# \*Improving Education for Recordkeeping

- \*What has been notably absent from the experience of most current and recent students has been:
  - \* Early and continuous integration of recording with practice
- \* Plan for teaching and learning about Recording Page 121 (Exhibit 3.8)

# \* Improving Education for Recordkeeping