[Insert organisation name/logo]

# CASE NOTES AUDIT EVALUATION TEMPLATE

|  |  |  |
| --- | --- | --- |
| **Staff name/ Role** |  | |
| **Supervisor name** |  | |
| **Date** |  | **Time: .am/pm** |
| **Total number of files audited** |  | |

**Results**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SCORE 1 – 8** | | | **Number of files on this category** | |  |
| **ACTIONS** | | | | | |
| **Responsible** | **Primary action** | **Follow-up**  **[insert date]** | | **Outcome** | |
| **WORKERS** | For example: To practice-writing case notes with your manager and work through keys to good writing. |  | |  | |
| **MANAGERS** | For example: To ask worker to read keys to good writing and discuss what goes into a case note |  | |  | |

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| --- | --- | --- | --- | --- | --- |
| **SCORE 9 – 16** | | | **Number of files on this category** | |  |
| **ACTIONS** | | | | | |
| **Responsible** | **Primary action** | **Follow-up**  **[insert date]** | | **Outcome** | |
| **WORKERS** | For example: You understand many of the principles of case notes. If you would like to improve your skills work through keys to good writing and try using the case note framework. |  | |  | |
| **MANAGERS** | For example: Try asking your workers to use the case note framework to improve their case notes writing skills. |  | |  | |

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| **SCORE 17 – 24** | | | **Number of files on this category** | |  |
| **ACTIONS** | | | | | |
| **Responsible** | **Primary action** | **Follow-up**  **[insert date]** | | **Outcome** | |
| **WORKERS** | For example: Wow! Congratulations you are on your way to becoming an expert. Have a look at the completed framework for more ideas. |  | |  | |
| **MANAGERS** | For example: Repeat the audit and keep monitoring case notes. |  | |  | |