Facilitator’s Guide – Part C Contact Note

Documentation that Reflects your Visit

Part 1 - Introduction and Content Requirements

* Handouts:
  + Contact Note Checklist
  + Early Intervention Activity Note Template 1
  + Early Intervention Activity Note Template 2
* Follow-up Activities:
  + Divide participants into small groups
  + Distribute copes of Review #1 (There are 8 different contact notes)
  + Ask groups to read the note and using the contact note checklist as a guide, discuss:
    - What is missing?
    - What else would you want to know?
  + Ask groups to share their observations using the notes from Review #1 – Leader’s Guide to prompt discussion

Part 2 – Documenting Ongoing Assessment

* Handouts:
  + Definition of Functional Assessment
* Follow-up Activities:
  + Distribute copies of the Functional or Not Functional activity.
  + Read each statement on the Functional or Not Functional activity.
    - After each statement, ask the group to vote whether it is functional or isolated
    - Have volunteers share why those chose functional or isolated
    - Have volunteers re-word each statement to make it more functional referring the Functional or Not Functional Leader’s Guide for examples as needed.

Part 3 – Quality Documentation

* Follow-up Activities:
  + Divide participants into small groups
  + Distribute copes of Review #2 (There are 8 different contact notes)
  + Ask groups to read the note and using the contact note checklist as a guide, discuss:
    - What picture does the note paint?
      * What’s problematic?
    - What would you change if you were the provider?
  + Ask groups to share their observations using the notes from Review #2 – Leader’s Guide to prompt discussion (Leader’s guide also includes references to missing required content for each note if leader chooses to include this component in discussion)

Part 4 – Documenting Coaching and Additional Reminders

* Handouts:
  + Quick Reference Coaching Guide
  + Contact Note Checklist
* Follow-up Activities:
  + Ask participants to bring two or three of their own contact notes.
  + Using the handouts as a reference, have participants review their notes and consider the following questions:
    - Do your notes reflect your visit?
    - Is the picture clear to any reader?
    - Are all required components documented?
    - Do your notes build upon one another to create the big picture?
    - Can you identify the steps of the coaching process in your documentation?
    - What would you change or add based upon the documentation presentations?
  + Ask volunteers to share their insights.