

Collaborative Documentation Implementation

Quick-Start Guide

Once you have completed the training video, please reach out to the Collaboration Documentation liaison at your clinic if you have any questions. Your clinic may have specific requirements in order for you to start using Collaborative Documentation. The suggestions below are provided for guidance.

Choosing your first clients

It is possible to begin using CD with clients you are currently seeing, however it is probably easier to begin using CD with new clients with whom you have not started treatment. If you would like to start with a client you are currently seeing, make sure you choose a client you will be most comfortable with in starting Collaborative Documentation. You may want to prepare your first session by using scripts that are provided in the training PowerPoint to introduce Collaborative Documentation for the Assessment, Treatment Plan, and Progress Notes. These can be used with a client you are currently seeing, as well as with new clients.

Shadowing

An important step in assisting you in gaining confidence in starting Collaborative Documentation is to shadow a colleague that is experienced in using Collaborative Documentation. If you are in the process of getting trained at your clinic, most likely there will be peers ready to have you shadow them to get started.

Six weeks to get comfortable

It is generally recognized that it takes about 6 weeks for Collaborative Documentation to become comfortable for practitioners. So expect difficulties and challenges when you begin implementing Collaborative Documentation. Typical obstacles that will need to be addressed are awkwardness of using the computer equipment when documenting collaboratively; the sense of interruption in transitioning to collaboratively documenting in the session with your client; getting used to structuring sessions using Collaborative Documentation procedures. Practitioners will find that being able to consult with peers, for example during regularly scheduled staff meetings, and guidance from their supervisors are very important in mastering Collaborative Documentation. Some practitioners may find it more comfortable to begin using aspects of Collaborative Documentation, for example formulating the goals of each session with the client, prior to actually doing an actual Collaborative Documentation session with the client (i.e. 100% of the note completed during the session with the client).

Anticipating difficult situations and clients

It is important to remember that Collaborative Documentation is not an EBP, and you as a practitioner will always decide when and how to use Collaborative Documentation, based on your clinical judgment and comfort level. As you gain experience, you will feel more comfortable in implementing Collaborative Documentation with a wider range of clients and situations. To begin, however, you are likely to feel insecure, and it is helpful to keep in mind a few strategies. The first, is to agree to disagree with your client when you encounter an area of disagreement while documenting. For example, if your client does not agree with you that he appeared agitated in the session, you may document your observation along with your client's disagreement ("client reported not feeling agitated and disagreed with therapist's observations"). The second, if the client becomes particularly agitated about a specific topic and you do not feel you will be able to effectively document this content with your client, you can tell your client that you will not document this information with your client today, but will share this information with your client at a later date when h/she is better able to discuss this material.