

Empowerment Through Effective Record Keeping: A Message to Parents

By Carol Wilson

We need to remember that doctors, therapists, schools, and any other service providers are businesses. It is our job to learn how the business works and to be professional about ourselves or our children, and getting what we need and what the law states we must have from the system. Records are vital and can become legal documents. It is important to get every record that exists. We also need to chart our own observations about what is going on. We cannot trust such important information to memory or chance, but must become active participants in this struggle to get needs met.

Records are valuable information in many instances. Should a parent die, the designated caregiver will have a complete and accurate record. All those things about Jon that only mom would know are in his records to assist someone else. If a child or adolescent ever gets in trouble with the law, we have proof that he is not a bad kid, but has some special needs in his life. Records can be given to children as they become adults and take responsibility for their own lives and become their own advocates. For adults, records help in charting the course and clarifying goals, and obtaining what you need from the system.

I have a chart in my work area that I copied from a hospital. It says: "Remember, if you don't chart it, it never happened." I have been told by legal representatives that personal and parental charting and record keeping if done consistently and accurately is permissible in a court of law. After all, when you walk in with binders of information charted, sleeved, and organized, no one is going to think you put it together a few days before the hearing.



Tips on letter writing and documentation:



1. Writing letters (documenting) is just one part of this whole process. It is not the solution or the answer in and of itself, but it is a critical part of getting what you need.

2. Don't be concerned about failure — this is a **LEARNING** process! You only get better by doing, and you learn from your mistakes. Most of us start out feeling this is an impossible task, but it does get better if you keep doing it.

3. Try to be as direct and concise as possible, but don't worry about perfection. What's important is that you get it written down. They will have the opportunity to correct any miscommunications in their written response. And don't try to document the entire conversation, only the issues that are important to you.

4. Whenever possible, keep it to a maximum of one or one and a half pages. Try to address only one issue per letter. Nobody reads or understands a long letter with lots of issues.

5. This is an opportunity to re-direct your sadness and anger! Put that energy into positive action. First drafts will usually be full of emotion — it is often healing to get these feelings out. Then re-write it stating the facts as you understand them, without the emotion.

6. Learn to identify what you want to see as an outcome. Ask directly for it. Make your expectations clear.

7. Remember, these letter writing principles apply to all situations you are dealing with. It can be equally effective when dealing with education,

medical, mental health, and other social service agencies as well.

8. Letters make communications clearer. They can be used to achieve any of the following and more:

- A. *To clarify what was said to you, or what you said.*
- B. *Document what was said to you, or what you said.*
- C. *Document agreements or disagreements.*
- D. *Justify your stand.*
- E. *State your change of mind since your last discussion or meeting.*
- F. *Apologize when you may have been out of line.*
- G. *Let someone's supervisor know when they have been responsive, respectful, or otherwise provided satisfactory services. (Don't forget to acknowledge any and all positives!)*

9. Keep track of time lines. How long do you have to respond? How long do they have? Did you ask for a written response within a specified number of working days? Did you state that if you have misunderstood in any way to respond in writing to clarify, also within a specified number of working days?

10. It isn't always necessary to quote the legal reference applicable to your request or issue, **BUT** using the language as it appears in the law is often effective. Quoting the legal reference will be seen as adversarial, so I don't recommend starting with it.

11. Always end your letters with a positive statement about wanting to work with them to resolve these issues. If you ever go to court, hostile letters with little intention of trying to resolve will not help your case. And, truly, this really is what most of us want. We just want things to get better for our kids. Few of us **REALLY** want to fight. We fight hard enough just to get through every day.

12. Don't waste too much time trying to resolve issues at the same level. Give it a reasonable try, but then go higher. If you send a copy (cc) of your letters to the next level up, they

should be somewhat informed of the situation when you need to ask for their assistance.

If you would like a set of my workshop handouts, which includes divider pages for a binder, sample forms that you can fill out, sample letters, and tips on how to get started in record keeping and other important information, please send \$15 to cover copying and postage costs along with your address, and I will be happy to send you a set. Carol Wilson, 5109 Ross Lane, Marrero, LA 70072.

Carol Wilson is the mother of a son with a dual diagnosis of Klinefelter Syndrome and schizophrenia. She has been tireless in her efforts to get appropriate treatment for her son and others like him.

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