

## **SUA Narration Standards for Options Counseling & ADRC Staff**

- We jointly acknowledge and agree that if it is not narrated, it didn't happen.
- Narration is a permanent, chronological record of any contact or attempted contact or action that relates to the consumer's case or benefits'. Narratives can be read by consumers and their representatives as requested.
- Essential elements, such as, phone calls made or attempted, messages left, letters and forms sent, conversation(s) with or regarding the individual must be narrated at each contact.
- Narration should be done at the time of contact or activity. If unable to narrate the same day it will be completed no later than three business days after the event.
- No need to duplicate information captured elsewhere so if allowed by agency procedure you can combine multiple contacts that occur on one day into one narration. Be sure to narrate where or what date the reference occurred.
- Narration records should not be saved as "draft" or "incomplete" unless extenuating circumstances require user to do so. Follow up action must be taken on these records in a timely manner.
- Narration will be objective, factual and free from personal bias, opinion, comments, or emphasis. Quotations are only used for actual statements to provide clarity.
- Narration will be descriptive, concise and complete so that others can understand the individual's circumstances.
- Narration should include (when applicable):
  - Who was seen, contacted, &/or initiated the contact?
  - What was the date of the contact and where did the contact take place?
  - Who else participated, was interviewed or corroborated the information
  - What actions will be taken and by when?
  - If follow-up is needed and who is responsible?
- Narratives will be completed using proper grammar, spelling and punctuation. Only agency-accepted acronyms and abbreviations will be used, or terms will be spelled out.
- Narration will address consumer goals, decisions made, and/or actions taken.
- Narration regarding Domestic Violence and Protective Service allegations should follow local policy and procedure as defined in IM 15-091.
- HIPPA protected medical treatments and conditions should not be narrated.