FIVE (5) ATTRIBUTES OF CLTS FUNCTIONAL SCREEN QUALITY NOTES

Notes contain the evidence/substantiation/verification to support what is selected (or not selected) on the CLTS Functional Screen. There is a reason certified screeners select certain items on the CLTS Functional Screen. Notes should provide the facts/details/specifics that led to those decisions.

Purpose of Quality Notes:
If a screen is reviewed after a period of time (6 months, a year, etc), anyone (the screener, the child's parents, an administrative law judge, the CLTS FS Coordinator, an agency supervisor, etc) should be able to stand behind the functional screen results with the evidence contained in the note sections on the screen. It must be clear that functional eligibility was determined based on all evidence available at the time of completion by a professional certified screener.

Five (5) Attributes of Quality Notes:

1. PROPER FORMAT
2. PROFESSIONAL APPEARANCE
3. PREVIOUS NOTES ARE ACCURATE OR DELETED
4. INCORPORATE MULTIPLE SOURCES
5. CONTAIN DETAILED EVIDENCE

1. **PROPER FORMAT**
    Dates and initials appear with notes, in desired format.
    a. Newest notes at the top of the note section; and
    b. Date (MM/DD/YY) - Notes - Initials/Program Affiliation.

    Notes appear on every page of the CLTS FS. Proper formatting is important because uniformity of the most up to date note at the top of the note section means anyone reviewing the screen knows where to look for the most relevant information. The format serves the purpose of locking (bookends) in a screener's notes so that no one else can accidentally add to the notes a screener has written.

2. **PROFESSIONAL APPEARANCE**
    Notes must reflect a professional, legal, court ready document. This includes correct spelling and grammar. The CLTS FS represents the screener's best work. Acronyms and abbreviations should not be used. Additionally, a screen with notes that are grammatically correct and correctly spelled will be easier for a subsequent screener or someone reviewing the screen to understand. Writing notes in a Word document where spell check can be used is recommended. These notes can then be copied into the CLTS Functional Screen.

3. **PREVIOUS NOTES ARE ACCURATE OR DELETED**
    Previous inaccurate, irrelevant, unprofessional or no longer applicable notes are deleted from the CLTS FS. Every note on a functional screen must support the child's *current* functional abilities. Notes are always saved with screens in the 'History' of the CLTS FS. If previous notes remain entirely accurate, and pertinent to the current screen, screeners should indicate that this is the case in a newly dated entry.

4. **INCORPORATE MULTIPLE SOURCES**
    Notes indicate that findings were corroborated from multiple sources of information and specific sources are identified. Sources must represent the child's functional abilities in multiple locations throughout their day. Multiple sources are important throughout the screen but are essential on all selected categories on the Mental Health, Behavior and IADL pages. Sources include:
    a. Child – observations during the home visit
    b. Parent – information shared during the home visit and in written form (application, etc.)
    c. Others – verbal reports from others in the child's life
    d. Reports – written documentation of the child's functional abilities

5. **CONTAIN DETAILED EVIDENCE**
    Notes provide details of the child's functional ability that led to what was or was not selected on the CLTS Functional Screen. Notes present evidence to answer the question, "How would someone know the information selected on the CLTS FS is correct?" Notes:
    - Include objective descriptions of skills demonstrated at the home visit;
    - Provide evidence gathered from reports; and
    - Provide facts including the what, who, why, where, when with specific content.