How - to documentation guide

A practical step-by-step guide for documenting safeguarding concerns clearly and effectively.

Step 1: Act first, record promptly

Principle	In practice
Ensure the child is safe before documenting.	Take any immediate action needed to protect the child, then document.
Document as soon as possible.	Aim to record before your shift ends. Note time of event and time of recording.
If you cannot document immediately.	Make brief notes (date, time, key facts) to write up fully as soon as possible.

Step 2: Use the right system and template

✓	Item
☐	Use your organisation's approved documentation system (e.g., case management software, incident report form).
☐	Select the correct form or record type for the concern (e.g., incident report, concern log, progress note).
☐	Check whether this concern needs to be linked to an existing record.
☐	Do not use personal devices, personal email or informal notes as the primary record.

Step 3: Record the core information

What to include	Tips
Date and time of the event	Record both the time of the event AND the time you are writing the record.
Who was involved and who was present	Use full names or client identifiers as per organisational policy.
What was observed (physical/behavioural)	Specific, descriptive; avoid labels like 'aggressive' or 'attention-seeking'.
What was said	Use the child's exact words where possible; put in quotation marks.
Your response and actions taken	What you did immediately; who you told; when; any escalation steps.
Any follow-up required	Note next steps, responsible person and timeframe.

Step 4: Review before saving

✓	Item
☐	Is everything factual? Remove or re-label any opinions or assumptions
☐	Are the child's words in quotation marks and accurately recorded?
☐	Are dates and times correct?
☐	Is the language professional and neutral?
☐	Does the record clearly show what actions you took?
☐	Is the record stored in the correct location?
☐	Have you notified your supervisor if required?

Step 5: Update the record as situations develop

Situation	Action
New information comes to light	Add a dated update to the existing record.
Follow-up actions are completed	Record the outcome and next steps.
Escalation occurs	Document who was informed, when, and what was decided.
Concern is resolved or closed	Note the closure, who made the decision and why.
Concern reoccurs	Link new record to prior documentation.

Good documentation is not about perfect writing. It is about capturing the right information, in the right place, at the right time, so that others can understand, follow up and act on it if needed.