

This is an accessible version of the Writing objective progress notes workbook for use with a screen reader.

This document is intended to be used by the person participating in the training session.

# Writing with bullet points - workbook

Last revised 30 March 2017

## About the program

This training program is an action from the Tasmanian Disability Sector Language, Literacy and Numeracy Skills Action Plan 2016 - 2017.

The aim is to train support workers and team leaders with the skills to write using bullet points.

This program involves a one-hour, team-based training session

## Session objectives

At the end of this session you will be able to:

* Recognise the benefits of writing with bullet points
* Identify when to write using bullet points
* Write bullet point lists appropriate to workplace documents

## Note

We use the term “progress notes” to refer to the documents created by support workers at the end of a shift. The term you use might be different from this, but the meaning will be similar. Other terms you might use are:

* Daily notes
* Shift reports
* Communication notes

## Why do we write progress notes?

The purpose of writing progress notes is: (list 4 reasons)

## Who reads the progress notes?

The progress notes will be read and used by: (list 3 possibilities)

## What is done with the information in progress notes?

How is the information used? What actions are taken based on the information?

The information in progress notes is used to: (list 4 options)

## What information needs to be reported in progress notes?

The information we need to include in progress notes is: (list 5 possibilities)

## Example writing with bullet points

### Some background

Kent is 23 years old, is ambulant, and has recently moved into supported accommodation. The goals articulated in his plan are about:

* Socialising more with others
* Becoming more physically active for health and wellbeing
* Increasing the range of foods he enjoys for health and wellbeing
* Learning to catch a taxi independently

### Progress notes for Kent – without bullet points

Today we went for a picnic to Seven Mile Beach with three housemates in the van from Hillary Street because ours is being repaired. The residents had a discussion about who would sit where and they all agreed where to sit but Kent did not look happy and then he tried to do up his seatbelt but couldn’t do it without help I think it was because he usually sits in a seat where the seatbelt does up on the right-hand side but today it did up on the left hand-side. When we got there we parked at Site 3 where we always go because it has a table and bench seat and Kayanne’s wheelchair fits at the end of the table. At lunch time Kent ate his favourite sandwiches the ham and salad ones and also ate an apple after I had peeled it even though he wouldn’t eat it whole or even with skin on but he wasn’t interested in drinking anything, as we only had water. Then we spent about an hour on the beach and some people went swimming including Kent but he only really paddled not really swimming properly and he was talking to Jane. The trip home was fine and then when we got back to the house he prepared dinner with assistance from Jane (staff).

### Progress notes for Kent – using bullet points

During today’s shift, Kent:

* Went on a picnic at Seven Mile Beach with housemates
* Agreed to sit on the right side of the van, but frowned when in the seat
* Was assisted to do up his seatbelt (maybe because it did up on the left-hand side – he usually sits on the other side of the vehicle)
* Chose to eat ham and salad sandwiches
* Didn’t want to eat apple at first, but did when it was peeled
* Didn’t drink anything, we only supplied water
* Paddled up to his knees at the water’s edge for about an hour
* Talked with Jane (staff) occasionally while paddling
* Made dinner with Jane’s assistance. He chose lamb chops with potato salad and green salad.

## Benefits of using with bullet points

In workplace writing, we can use bullet points to give other people information.

Bullet points are used to draw attention to important information within a document so that a reader can identify the key issues and facts quickly.1

Other benefits of bullet points are:

Oxford Dictionary https://en.oxforddictionaries.com/punctuation/bullet-points

## Getting started

For progress notes think about:

* Why you’re writing the document
* Who will read it
* What they will do with the information
* The goals in the person’s plan
* The order in which things happened (chronologically)
* Highlights or significant details of the shift
* Any specific things that the person’s team need information about

## Activity Practice writing progress notes using bullet points

With a partner, write progress notes using bullet points.

Base this on your last shift. Record this on the next page.

## Other documents where you can use bullet points

* Incident reports
* Planning
* Workplace procedures (use numbers for actions/steps)

## Activity Practice writing an incident report using bullet points

With a partner, think about using bullet points to write an incident  
report.

When you’ve finished these questions, re-write the incident on the next page.

Why do we write incident reports? List 2 reasons

Who reads incident reports in your workplace? List 2 possibilities

What information do they need? List 4 options

How is this different from the information needed in progress notes? List options

### The incident

I went to Casey’s house at 43 George St, St Ives and on the front steps I tripped up the step and really hurt my knee it was bleeding and a big bruise came up after about 10 minutes and about then I also got a headache. I probably got to Casey’s place at about 7:35 in the morning because I was a bit late because my husband was late home from work from a shift overnight. Anyway I went up to the door and luckily Brian (Casey’s husband) was home still and he helped me into the house and reckoned that I shouldn’t work today because it was bleeding pretty badly and I was a bit upset. So I rang the office and Mary said that she could send Doug over to cover my shift and then Brian got some band aids and put on my knee and I had some Panadol in my bag so I took them too. I felt bad because Brian ended up being late to leave and Doug didn’t get there until 9:00 so Casey had to change her appointment time until tomorrow. Then I went into the office and talked to my manager and then did this report. I might go to the doctor.

Complete the details to fill in your details and describe what happened. Pretend that you are the injured person.

### Sunny Services

### Accident/Incident Report

**Person completing this form**:

**Incident date:**

**Time:**

**Date completed:**

Number (office use only):

**Location of incident:**

**Parties involved:**

**Client**

**Employees**

**Incident reported to** (manager/coordinator):

**Accident / incident summary**

If there was an injury, which part of the body was affected?

**Write a summary of the incident:**

* Explain what happened and what you did in response
* Describe any injuries

## Grammar guidelines for formatting bullet point lists

There are no fixed rules about how to use bullet points, listed below are some guidelines. Your workplace may have a style guide that includes guidelines.

### Use a colon to introduce a list

The colon (:) introduces the list

My favourite car manufacturers are:

* Jaguar
* Lamborghini
* BMW

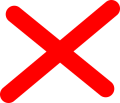
### Use capitals consistently

Always use a capital letter for names.

If you are using a computer program and it automatically capitalises bullet points don’t change it, unless your workplace asks you to.

Be logical

Check all your bullet points make sense with the introductory sentence. You should be able to read the introductory sentence followed by any one of the bullet points, and it sound okay. Make separate lists if necessary.

Eating fruit and vegetables helps you to:

* Maintain a healthy weight
* Have strong bones
* Have regular bowel movements
* Cheap to buy when in season
* Buy it at the local market

Eating fruit and vegetables helps you to:

* Maintain a healthy weight
* Have strong bones
* Have regular bowel movements

You can buy cheap fruit and vegetables:

* When in season
* At the local market

### Be consistent with punctuation

If each point is a single line or one sentence, don’t use punctuation. For example,

correct exampleFruit in season at the moment:

* Apple
* Pear
* Orange
* Raspberry

incorrect exampleFruit in season at the moment:

* Apple.
* Pear.
* Orange.
* Raspberry.

If each point includes complete sentences, use punctuation.

correct exampleThe speech pathologist suggested the following to assist John practise his exercises:

* Minimise distractions by turning off the TV and radio, and switch the phone to silent.
* Pick a good spot, for example, sit at his desk to put him in a work mindset.
* Watch out for frustration. Take a break, breathe deeply and relax for a couple of minutes.

incorrect exampleThe speech pathologist suggested the following to assist John practise his exercises:

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### Avoid repeating words at the beginning of the bullet points

Include the repeated word in the introductory sentence.

incorrect exampleWould you like:

* To do your shopping at the Farmers Market?
* To do your shopping at Coles?
* To do your shopping at IGA?

correct exampleWould you like to do your shopping at:

* The Farmers Market?
* Coles?
* IGA?

### Use a consistent tense

Tense is a part of language that tells us when something happened. When you mix past, present and future tenses together in a list it makes it difficult to make sense of.

Today we have the choice of:

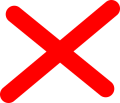
* Swimming at the beach
* Driving to Huonville
* Walking to Tolosa Park

Today we can:

* Paint the back fence
* Walk to visit Jeremy
* Fish at the wharf

Yesterday we:

* Painted the back fence
* Walked to visit Jeremy
* Fished at the wharf

During the morning Benjamin:

* Ate breakfast
* While hanging out the washing he said he had a headache
* Caught the bus to work
* Wants to phone the electricity company

Can you rewrite Benjamin’s list above so it is clearer?

## Activity Practice writing progress notes using bullet points

On your own use bullet points to write progress notes from   
the second last shift you worked.

Remember to think about:

* Why you’re writing the document
* Who will read it
* What they will do with the information
* The goals in the person’s plan
* The order in which things happened (chronologically)
* Highlights or significant details of the shift
* Any specific things that the person’s team need information about

Also, see if you can:

* Use a colon to introduce the list
* Use capitals consistently
* Be logical
* Be consistent with punctuation
* Avoid repeating words at the beginning of the bullet points
* Use a consistent tense