

Ep #97: Speed Up Your Documentation with These Practical Tips



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With Your Host

Heather Branscombe

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Episode 97, How to Speed Up Your Documentation.

Welcome to *Clinicians Creating Impact*, a show for physical therapists, occupational therapists, and speech-language pathologists looking to take the next step in their careers and make a real difference in the lives of their clients. If you're looking to improve the lives of neurodiverse children and families with neurological-based challenges, grow your own business, or simply show up to help clients, this is the show for you.

I'm Heather Branscombe, Therapist, Certified Coach, Clinical Director, and Owner of Abilities Neurological Rehabilitation. I have over 25 years of experience in both the public and private sectors, and I'm here to help you become the therapist you want to be, supporting people to work towards their dreams and live their best lives. You ready to dive in? Let's go.

Hi there, friend. How are you doing today? I love thinking about all the possible things you could be doing as you're listening to this podcast today. One of the reasons that I love podcasts is that it allows me to multitask. I get to listen while doing something else.

I especially love listening to podcasts when I'm doing things like driving places, going for walks, or doing some of those mundane household chores that I'd rather not be doing, like dusting, vacuuming, putting things away in the dishwasher. So whatever you're doing right now as you listen, welcome. And thank you so much for listening. I so appreciate you taking the time to learn, and you are one of the reasons I love this profession so much.

Imagine what you could do at work if you were more efficient with your documentation. How could that change the impact for both you and your clients? One of the least favorite things about being a clinician, at least for myself, is the documentation. In fact, I talked about this more in episode nine of the podcast, how to get your planning and documentation done at work, because the last thing I want for you is to feel the need to bring your work home with you or have it bleed into your personal time.

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Fun fact, documentation is still one of my less favorite activities. And while I rarely do direct clinical work now, I'm here to tell you that documentation is still there. So this episode is kind of a follow-up to episode nine, and I want to give you some concrete tips on how to get your documentation done faster.

The whole idea behind this episode is if you use these tips, along with the concepts that I outline in episode nine, you're going to be able to plan more effectively, as well as planning less time in general for documentation, because you're just going to be faster at doing it. This is me giving you the principles of what I've learned in my 25-year experience of being a clinician, and I want to distill it for you now into a simple plan for you to follow. Sound interesting? Well, let's dive into it.

My first tip for you to speed up your documentation is the principle that the sooner that you do it, the better that it is. And I want to offer at first, there's so many reasons that this is true. The sooner that you do it, your memory is fresher, you can have access to that amazing dopamine hit of a small accomplishment. Finally, you really don't have to have the extra mental weight of having the documentation metaphorically pile up for you.

So how soon could you do your documentation? Is there the possibility that you could even do it while you're with the client? Now, only you can answer in a way that works for you, and that's not always going to be appropriate. What I've also seen is there are some clinicians that will take notes on something like a sticky note or a laptop or another kind of notepad to refer to later.

And then if you're thinking about more lengthy reports, the concept can really still be the same. The sooner after seeing the client, the better it is going to be for you. So one of the questions I really like to ask myself when I'm thinking about how I could do things sooner is something like this, how soon could you do the documentation and what would it need to be different or how could it be different to make that happen?

So for me, what that ended up being was when I was doing more clinical notes on a day-to-day basis, for me, it meant that I was doing it at the end of my day,

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even if I stayed a few minutes later. I chose to stay those few minutes later because I really valued doing those notes as soon as possible. I would chart in the session whenever possible, and or I would write notes quickly in between sessions to quickly refer to later.

Also when it came time to doing reports, I would schedule time in my day for those reports, knowing it was my least favorite thing to do. And so knowing that as I scheduled that time for it, it would be complete and I would show up for that report just like I would show up for a client facing session.

My second tip is to work with your current schedule and your current energy levels. Now we all have different schedules as clinicians and we all have different energy levels. When are you the freshest? And when you're the freshest, what do you want to complete at that time?

Now, you may think that I would say do your documentation when you're freshest, but that wasn't true for me. I really prioritized client care, so I would document at the end of the day using the notes that I'd collected along the way to make it faster for me, knowing that I wasn't freshest at the end of the day. Even today, I prioritize meeting with clinicians that I work with or with other people over documentation. And I like my reasons for it.

So there's no wrong answer. And you might need to experiment to see what best works for you. I know that there are some clinicians that chart first thing in the morning from the previous day's sessions before moving forward, again, because that worked well for them. So depending on your organizational and other constraints, like your days of work, you get to decide what does and doesn't work for you.

Again, this is less about the tactic itself and more about the strategy behind the tactic. You really want to make sure that the tactics that you're using are aligned with your work schedule and how you like to work.

Now, the final tip I want to give you is the principle that done is better than perfect. So often when we document, we make the quality and the quantity of

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the documentation we do mean something about us as a clinician or even as a person.

Again, don't get me wrong, there are standards that we need to uphold as a clinician, especially if you're a clinician that's a member of a health college or you might have standards within your organization. There's also standards that third parties are looking for when they're seeing your documentation, especially in the form of a report.

By far, I see much less issues that clinicians are not meeting those minimum standards. That doesn't typically, that's not really our problem. What I see far more is that the standard we have for ourselves is so much higher and it results in us taking way more time to complete our documentation than we need to.

And I want to say we come by this honestly as clinicians. So many of us have had to go above and beyond all along our educational pathway to receive the grades that we needed to get into our clinical program and then to stay in our clinical program. And even the thought of going above and beyond, when you say it, doesn't it sound altruistic, even noble? Almost a part of our identity as a clinician.

I just want to offer that going above and beyond is a thought. I say that because what is going above and beyond to one person isn't the same to someone else. I also want to ask, how does documentation and using documentation above and beyond really help the impact that you are creating with a client? Is that where your impact as a clinician truly comes from?

Now, again, sometimes in a report that is true, the impact we can make with a report can be large. But you just want to decide in advance how much of an impact you have and whether you like, again, your reasons for that or not.

If you're resisting this thought, first know that I love that because critical thinking is so amazing and I love that you're using that. But think about how much time and attention was placed on how you document in your educational pathway, especially in your clinical education, to become that clinician versus how much

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of your time and attention in that education to becoming a clinician was about your client-facing clinical skills.

Also, how often do we use templates, especially now, when we can't complete our documentation? Knowing those facts, you really do get to decide how important documentation is to you, how important it is to your clients, how important it is to your impact, and to plan accordingly.

I really like the concept of B- level work, and for this, this would be B- level documentation. To me, B- means I've met all the minimum standards. This is a B-. I've met all the minimum standards to complete what I need to complete, and no one ever is going to say my documentation was stellar.

I will never be known for my documentation, nor do I actually ever want to be. Knowing that releases me from the extra mental weight of being amazing at documentation, and that allows me the freedom to be much more efficient in my documentation time.

So, imagine what you could do at work if you were more efficient with your documentation. How could that change the impact for both you and the clients that you serve? How can you use the principles of, number one, the sooner the better, number two, work with your schedule and energy levels, and number three, done is better than perfect? How could you work with all of those principles to speed up your documentation process?

And especially if you're doing something else right now, like driving, walking, or housework, which is amazing, what is the one takeaway you want to take from this podcast today to make sure that you remember and apply it the next time you're at work? I can't wait to see the impact that you create with this. Thank you again so much for listening and see you soon.

If you enjoyed today's show and don't want to worry about missing an episode, you can follow the show wherever you listen to your podcasts. And if you haven't already, I would really appreciate it if you could leave a rating and review to let me know what you think and to help others find *Clinicians Creating Impact*.

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It doesn't have to be a five-star rating, although I sure hope you love the show. I'd really want your honest feedback so I can create an awesome podcast that provides tons of value. To learn more about me and the work that I do, visit my website at www.abilitiesrehabilitation.com/clinicianscorner to download your free getting it all done at work process and to see what I'm up to. Thanks so much.

Thanks for joining me this week on the *Clinicians Creating Impact* podcast. Want to learn more about the work I'm doing with Abilities Rehabilitation? Head on over to abilitiesrehabilitation.com. See you next week.