

# Documenting With Care

**Trauma-Informed  
Case Notes That  
Protect Survivors**

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# Documenting With Care: Trauma-Informed Case Notes That Protect Survivors

Documentation is an essential part of victim advocacy work. Case notes help programs track services, maintain continuity of care, and meet reporting requirements that sustain funding for survivor support.

When advocates document interactions with survivors, they are also creating records that may one day be requested, reviewed, or subpoenaed. This reality makes documentation more than a routine administrative task. It becomes an ethical responsibility.

Trauma-informed documentation asks advocates to consider not only what is written, but how that information could impact a survivor if it were ever disclosed.

## Why Do Case Notes Carry Real Risk?

Victim service records are often protected by strong confidentiality laws and program policies. These protections exist to safeguard survivor privacy and maintain trust between advocates and the people they support.

However, there are circumstances in which records may be requested through legal processes such as subpoenas, court orders, or audits. Even when programs work hard to protect confidentiality,

documentation that exists in a system may still be reviewed by parties outside the advocacy relationship.

This is why many experts in the victim services field emphasize an important principle:

**Document with care, and document only what is necessary.**

The goal of case notes is not to create a detailed narrative of a survivor's life. The goal is to record essential service information while protecting the survivor's safety and privacy.

## What is the "Minimum Necessary" Approach?

In victim advocacy, a common best practice is often described as the minimum necessary standard.

This means documenting only the information required to:

- Track services provided
- Maintain continuity of care
- Meet funder or program reporting requirements

Anything beyond that may unintentionally introduce risk.

Advocates often feel pressure to capture every detail of a conversation in order to be thorough. But thorough documentation does not have to mean expansive documentation.

Sometimes the most ethical documentation is the most concise.

## How Can Too Much Detail Cause Harm?

Certain types of information, while shared during conversations with survivors, may not need to appear in formal case notes.

If records were ever subpoenaed or reviewed in court, these details could potentially create complications for survivors.

Examples may include:

- Detailed descriptions of substance or alcohol use
- Parenting conflicts or disciplinary moments involving children
- Ongoing communication with an abusive partner
- Immigration concerns or undocumented status
- Information unrelated to the services being provided
- Belonging to certain demographics, like race, ethnicity, and LGBTQIA+

These are deeply personal experiences that may be important in the advocacy conversation, but they are not always necessary for service documentation. In many cases, including them in case notes

does not improve services and may introduce risk if the information is later disclosed.

## How Can Staff Focus on Services and Not Behavior?

One way to approach trauma-informed documentation is to focus on the services provided by the advocate, rather than detailing the survivor's behavior or circumstances.

For example, instead of documenting:

*Client disclosed recent substance use and ongoing contact with the offender.*

An advocate might document:

*Advocate provided safety planning and referrals to supportive services.*

Both notes reflect the work being done. But the second approach protects the survivor's privacy and reduces the likelihood that sensitive personal information could be used in harmful ways later.

This approach also helps keep documentation focused on what matters most: the services and support provided.

## How Do Advocates Document Safely if Records Could be Reviewed by a Judge?

A helpful guideline often shared in advocacy training is simple:

## **Document as if someone outside the advocacy relationship might read it.**

This doesn't mean advocates should feel fearful about documentation. Instead, it encourages thoughtful reflection about how written information could be interpreted if viewed without the full context of the survivor's story.

Trauma-informed documentation prioritizes:

- Respectful language
- Clear, factual descriptions of services
- Avoidance of unnecessary personal details
- Survivor dignity and autonomy

When documentation follows these principles, it protects both survivors and the advocates supporting them.

## **How Can Trauma-Informed Documentation Protect Advocates Too?**

Thoughtful documentation practices do more than protect survivor privacy. They also protect advocates.

Writing highly detailed notes about traumatic experiences can require advocates to repeatedly revisit difficult conversations. Over time, this can contribute to emotional exhaustion and vicarious trauma.

Concise documentation that focuses on services rather than narrative detail helps advocates maintain professional

boundaries and emotional sustainability in their work.

## **Technology Should Support Ethical Documentation**

The systems advocates use every day should support these trauma-informed practices. Documentation tools should encourage clarity, simplicity, and confidentiality rather than pressuring advocates to collect excessive or unnecessary information.

At Vela, we believe the technology used in victim services should reflect the values of the field itself.

Integrity means recognizing the responsibility that comes with survivor data. It means building systems that support ethical documentation, protect confidentiality, and empower advocates to focus on their work rather than navigating complicated or risky data practices.

Every case note represents a moment of trust between a survivor and the person supporting them. Documenting with care helps ensure that trust is protected.

**Vela is driven by our core values to support survivor-serving organizations with compassion, integrity, innovation, collaboration, and gratitude.**

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*Developed with input from advocates at every stage, Vela by Element 74 is a trauma-informed case management and reporting platform built specifically for domestic violence, sexual assault, and human trafficking organizations.*

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