Boston University School of Social Work

Field Education Department

Handbook for the Use of Process Recordings in Supervision

"The value that… process recordings bring to my placement is the reflection. Without using a process recording, I wouldn't be able to reflect on certain sessions with clients, or seek out specific advice from my supervisor."

\- Second year clinical student

264 Bay State Road

Boston, MA 02215

www.bu.edu/ssw/academics/field

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The Boston University School of Social Work Field Education Department requires the use of process recordings as a teaching and learning tool in all MSW field placements.

Program Contact Information

Online Programs — sswolpfe@bu.edu | 617-353-3755

Charles River & Off-Campus Programs — sswfed@bu.edu | 617-353-3754

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Introduction

In the field, students and field instructors work together to construct, assess and promote students' learning through practice. The Boston University School of Social Work is committed to the use of process recording as critical tools in field education. Used consistently, skillfully and thoughtfully, these are vital tools in connecting students, field instructors, the work being done and students' professional growth over time. And used creatively, their full utility can be applied to most of the diverse interactions that students have in both clinical and macro practice.

Our goals are for you to:

- Be aware of the School's requirements for recordings
- Be able to use these tools flexibly
- Be familiar with recording formats

If you have further questions about process recordings, please feel free to ask your advisor for help or contact the Field Education Department.

Definition of Process Recordings

Process recordings refer to detailed accounts of professional interactions involving a social work student and other(s). Recordings usually contain a section of verbatim conversation between you and client(s), group participants, community constituents or other professionals. Other key elements of the recording are the social work student's self-reflection on the interaction, their thoughts and feelings about the interaction and use of self, space for comments by the field instructor, and identification of the competencies they demonstrated or are developing.

Purposes

Process recordings (both clinical and macro) assist in the development of overall social work knowledge and skills by parsing and examining specific interactions in detail and having the opportunity in real time to meet with your field instructor to discuss, receive feedback and implement feedback in the future interactions. This is a learning process that builds on skills.

Recordings have a number of educational and administrative purposes including:

- Development of skills in sorting and remembering important information
- Understanding of client(s), consumers, other professionals, projects
- Student's perception of the interactions and your interventions
- Student's self-reflection about developing skills
- Student's ability to apply theory and empirical evidence to practice
- Student's ability to plan ahead and to transfer learning from one activity to another
- Evaluating the student's progress over time

In addition, the recordings provide the field instructor with:

- A source of information about the student's activities
- A framework for supervisory conferences

"The whole point of process analysis (recording) is to help you step back and actually think about what you went through, what you were part of, and what it means. It doesn't have to take long to do a good process analysis, and the benefits make it well worthwhile. It's not just 'make work.' It's about learning to do good work well."

- Clinical Associate Professor, Macro Practice

Recording Formats

Process recordings can be completed in a variety of formats depending on your and your field instructor's style and preference, the nature of the services provided, and the focus of your knowledge and skill development. The two most common formats for clinical recordings are the column format and the narrative format. In addition, narrative recordings can be based on extensive psychosocial assessments, journals, and case summaries (with a self-reflection added in each case). The narrative format for macro assignments can take several forms including structured journal entries, meeting minutes and narrative responses to supervisor questions. A column format for macro assignments can also be used depending on the student's learning goals, the nature of the assignment and the field instructor's preference. Example templates for all formats can be found in the Appendix.

The School does not require a specific format. The field instructor and student should agree on what format(s) will best support learning, taking into consideration different situations and student learning styles. If a student and field instructor agree they can explore options to reflect in a way that is not specific to the common column and narrative formats, they are welcome to do so. This handbook provides examples of different formats that can be adopted based on the nature of the setting, service method and focus of intervention. However, all recordings share some common elements which are elaborated below.

Clinical students may write Macro process recordings, and Macro students may write Clinical process recordings.

Common Elements in All Process Recordings

Regardless of format, all process recordings should include the following:

1. Student's name, brief description of the client (or other involved people/group/ family/committee meeting), date of contact, # of contact
2. Goals for the interaction: The outcome the student hopes to achieve; does the client have the same goal(s)? If not, how are they different?
3. Student's plans to accomplish those goals
4. Verbatim content: In dialogue format (I said, she said), what was the content of the interaction? This section can include the entire contact or can focus on specific sections that were:
    - Challenging
    - Indicative of client/consumer or social worker insight, growth, change
    - Thematically related, e.g. loss, difficulty in relationships, feelings of hopelessness, examples of self-efficacy, participation, empowerment, leadership
    - Indicative of phases of the work, e.g., getting started, middle phase, ending
    - Evidence of specific skills the student demonstrated
5. Student's observations of behaviors, thoughts and feelings of clients or others involved in the interaction
6. The student's thoughts and feelings throughout interaction, including how use of self may have impacted interactions
7. Competencies demonstrated or requiring further work
8. The student's assessment of the client's situation and use of the session, as well as of interventions. Can include changes in assessment of the client from previous interactions, significant moments or interactions in which progress was made, barriers were encountered, insight was gained, etc. Did the student and client(s) or others involved achieve their goals? What are the goals going forward?
9. Questions for supervision such as:
    - What progress in the student's knowledge/skill development can be identified from this client contact?
    - How can the field instructor be helpful vis a vis this interaction?
    - Do you need additional learning resources and where can you find them?
    - How specific student thoughts and feelings may have impacted interactions?

Supervisory Comments on Process Recordings

Supervisory comments can address (but not be limited to):

- Strengths of the interaction
- **A few** areas for in-depth review, e.g. client behavior, behavior of others involved in the interaction; student verbal or non-verbal responses to particular feelings or behaviors, student's insights into use of self or demonstration of skills, ethical challenges, issues related to diversity and difference, power or other dynamics, leadership issues, effectiveness of outcomes, conflict resolution
- Connection of student's interventions or understanding to competencies, theory and/or research evidence
- Alternative ways of thinking about interaction or interventions student could have made
- Ways to help student increase empathy, change perspective, deepen relationship with client or others, broaden role (e.g., case management, advocacy, education)
- Resources/options that could be helpful
- Systems issues (either internal agency or external policy or other organization) that need to be addressed
- Linkage of learning from this interaction to previous and future learning
- New areas of learning for student to pursue

"Process analyses (recording) can really help to guide your supervision time at your field placement. They allow a space to not just discuss your to-do list, but to process your work with another social worker."

- Second year macro student

Using Recordings in Supervision

Here are some ideas about how process recordings can be used in supervision:

- Focus on most critical issues the recording demonstrated
- Respond to student's questions
- Have a discussion of skills, themes, and challenges evident in the recording
- Use the recording as a script for a role play (in which student plays client and field instructor plays student) – try different responses/interventions based on student/client's responses
- Identify where student is demonstrating improved skills in more than one interaction or assignment
- Include some line by line review with discussion of student's intentions and alternative responses the student could have used
- Lead to more generalized discussion of student's learning experiences in the internship

"As a field supervisor in a medical setting, I find process recordings incredibly helpful as a tool to help the student attend to the process of the interaction versus the content. In a setting where the social work role is primarily focused on goal setting, problems solving and connecting to resources, it's so important to teach students how to attend to the therapeutic process that supports the content of the interaction. It also helps me as the supervisor to make the time to work with the student on identifying strengths and supporting the patient's self-reliance when the priority is often connecting patients to services and/or resources."

- Field Instructor for 2nd year students

Timing: Writing and Reviewing Process Recordings

Students and field instructors should agree on a time frame for recordings to be written and given to the field instructor, read and commented upon by the field instructor, and reviewed in supervision.

Process recordings are most helpful if they can be reviewed in supervision before the next contact with the client, family or group.

Delays in either writing or reviewing recordings should be discussed by the student and field instructor and a plan should be developed to minimize delays.

"I usually start process recordings feeling like they are a chore. But by the time I'm done I have so much more insight about my practice with clients. I find both things that I should have done differently and things I did that were more meaningful and helpful than I even realized at the time. Process recordings can get you unstuck when you aren't sure where to go next with a client and they can also help you recognize when you are on the right track, which is a great confidence-booster."

- Second year clinical student

Time-Saving Strategies

Process recordings can take a lot of time (several hours) for students to write – especially as they are starting their internship – and for field instructors to review and write comments. The usefulness of recordings as teaching and learning tools is not necessarily directly related to how long they took to write or read. Here are some strategies for managing the time it takes to write and read these documents:

- Use the recording as a script and **role play** it together in supervision; stop the action when one of you has a question or a point to make.
- Write verbatim sections only on those parts of the interaction that demonstrate a **competency** you are working on, or that were particularly **difficult**, **confusing**, **powerful**, or **successful**.

- Use in-depth **agency documentation** (e.g. assessments, progress notes, treatment plans) in place of <u>some</u> verbatim recordings <u>and</u> add a section based on your self-reflections about the interaction.
- Stop writing the recording after **45 minutes**; whatever you have written will be a good starting point for discussion in supervision.
- **Don't worry** about parts of the interaction you can't remember – just indicate in the recording/analysis that you can't remember what happened then and keep writing.
- **Take notes** during the session or meeting (as long as this is not distracting) or write key words during the interaction; these can be helpful in reminding you what happened and should enable you to write more quickly.

Confidentiality

The following guidelines apply to all practice material (e.g., process recordings, case records, meeting minutes, group recordings). Students and field instructors should ensure that agency documents and recordings are de-identified in accordance with HIPAA regulations. Agencies are expected to provide students with the same training provided to employees regarding HIPAA regulations related to the specific setting. In settings which are not covered by HIPAA, students are expected to protect client/consumer/participant confidentiality in accordance with professional practice standards, including but not necessarily limited to the following:

- Delete any reference to the agency name and/or staff names.
- Change names (first and last) and initials.
- Delete any reference to address or any information specifying geographical area, such as street names, businesses, or hospitals.
- Delete any information that would enable identification of clients, other professionals, agencies, or agency personnel.
- Use e-mail and other electronic means to send recordings/analyses between the student and field instructor (and the student and advisor) with attention to the privacy of the people about whom the document is written.

Please note:

In most cases, agency records cannot be removed from the agency. However, students should be informed of and adhere to the agency's policies regarding removal of case records and other agency documents from the agency premises.

Process Recording Policies

- Students are required to write at least ***one recording for every 48 hours in placement,*** with the intent that these will be written over the course of the semester. Total requirements per track are:
  - Foundation year students 10 process recordings for the entire placement.
  - Advanced year students 15 process recordings for the entire placement.
  - Advanced Standing and HSE students 20 process recordings for the entire placement.
  - ***Field instructors may require more than this number and this expectation should be clarified in the interview process and documented in the learning contract.***
- Process recordings should be used flexibly to support the student's learning goals and level of knowledge and skill.
- Recording expectations should be specified in the Learning Contract.
- Recordings are in addition to the documentation required by the agency for its own records or files.
- Some time may be allotted in the student's schedule at the agency to work on recordings, although it is likely that outside time will be needed to complete them.
- **Recordings should be disguised to protect the confidentiality of clients or consumers**. See guidelines for confidentiality of documents above.
- If any recordings contain identifying information they should be destroyed at a point in the student's internship when they no longer serve their educational usefulness (end of contact, end of semester, end of placement). This should be done in compliance with state law and agency policy.
- Other forms of recording—e.g., audiotape, videotape, log—can be very useful learning tools, but do not serve the same educational or supervisory functions as written recordings. At the discretion of the field instructor, these forms of recordings may be used in in place of a select number of written recordings.
- Examples of process recording templates are available in the Appendices to this guide. Field instructors may also choose recording formats with which they are familiar and which are appropriate for the type of assignment and the student's learning goals and needs.
- **Failure to adhere to the policies and procedures regarding recording may lead to the convening of a Problem Resolution meeting and/or may be reflected in the student's grade in Field Education.**

- Teaching skills related to recordings is primarily the responsibility of the field instructor, although this learning is supported and reinforced in the first year Field Seminar and practice courses at the School.

Appendices:

Helpful Resources

Process Recording Templates

Helpful Readings

Black, P. N., & Feld, A. (2006). Process recording revisited: A learning-oriented thematic approach integrating field education and classroom curriculum. *Journal of Teaching in Social Work*, *26*(3-4), 137-153. http://dx.doi.org/10.1300/J067v26n03_09

Fox, R. & Gutheil, I. A. (2000). Process recording: A means for conceptualizing and evaluating practice. *Journal of Teaching in Social Work*, *20*(1-2), 39-55. http://dx.doi.org/10.1300/J067v20n01_04

Homonoff, E. (2014). Gimme that old time reflection: Process recording. *Field Educator*, *4*(1). Retrieved from http://fieldeducator.simmons.edu/article/gimme-that-old-time-reflection-process-recording/

Medina, C. (2010). The need and use of process recordings in policy practice: A learning and assessment tool for macro practice. *Journal of Teaching Social Work*, *30*(1), 29-45. http://dx.doi.org/10.1080/08841230903479474

Urdang, E. (2010). Awareness of self – A critical tool. *Social Work Education,* (*29*)5, 523-538. http://dx.doi.org/10.1080/02615470903164950

Individual, writeable Word documents for Process Recording Templates can be found at the following links:

- Clinical Process Recording Template – Column Format
- Clinical Process Recording Template – Narrative Format
- Group Process Recording Template
- Macro Process Analysis Template – Column Format
- Macro Process Analysis Template – Journal Format
- Task Tracker/Task Administrator Log