



Trauma Informed Review: Assessing Documentation & Forms



Purpose

The table below is a tool to help review your documents and forms from a trauma informed lens. While there are many ways to use this assessment tool, the approach we have found to be both thorough and time efficient is for your reviewing team to score the document of interest individually and then as a group. The aim of this review process is to gain insight on how documentation and forms present themselves and to remove, when possible, language that can be activating. If certain language cannot be removed (e.g., federal guidelines), staff administering the form can be aware of this potential activation point and plan accordingly.

Who

An ideal review group can include staff who use the document or form regularly, a leadership representative, people you serve, and individuals from less-represented identities. Multiple perspectives help to gather a holistic understanding of the impact of the document or form. We also recommend prioritizing the feedback of individuals with lived experience and those who use or have used the document or form you are reviewing to support that the review outcome meets its intended purpose. Prioritizing feedback from those with lived experience helps ground the review process in how the document or form is used in practice. This approach encourages accountability and enhances trauma informed outcomes.

When

We recommend that your reviewing your documents and forms annually to biannually. For new documents and forms, we recommend additionally including a trial period with a follow-up review after launch to catch any errors or challenges quickly.

Considerations

There may be different comfort levels around giving feedback during this review related to identity, positionality, organizational role, and past experiences giving feedback.

- This review process requires dialogue.
- Offer different ways people can provide feedback.
- Provide clear explanations of what will happen with the feedback along with any anticipated limitations.
- Create a space that supports regulation and co-regulation through fidgets, breaks, and movement.

Trauma Informed Review Instructions

1

Review the Document

Choose a document or form for review and ensure everyone has a copy. Have a staff member who regularly uses the document explain common usage, and ask leadership to clarify its purpose and whether it is mandatory. Provide scenarios or examples to help those unfamiliar with the document.

“A Release of Information (ROI) is a document that allows us to communicate and coordinate your care with other providers, ensuring you receive comprehensive and well-coordinated treatment. By signing this form, a client give us permission to share specific information. If a client wants information to be released to certain people or entities, it is required under HIPAA regulations...”

2

Foster Discussion

Emphasize that all feedback is solely for improving the document and will not affect employment or service status. Discuss what everyone would like from each other to create a place that fosters feedback and discussion.

“Before we begin, I want everyone here to know that the goal of this review is to improve our documentation. We want feedback, even feedback that we might not be able to respond to immediately, and know people here might have different opinions during the review. With that, I want to make it clear that any feedback you give about these forms today will not impact your employment, enrollment in our services, or your relationship with this organization.”

3

Individual Review

Individually review using the TIC Review Form, noting whether the form supports or hinders trauma-informed values. This review can be completed before or during the meeting, with an option for online responses to facilitate sharing.

4

Find Consensus



















Convene as a group to review responses and discuss any discrepancies, prioritizing feedback from those who have used the document. If consensus cannot be reached, use a democratic vote to decide.

5

Action Planning

If your document does not uphold the values listed, discuss as a group how the document can be rewritten for both people served and the workforce. If the document cannot be altered (e.g., governmental form), discuss strategies or scripts that can be used to make engaging with the document more accessible. Additionally consider changing the layout of the document or how information is organized for improved readability if certain language cannot be changed. We recommend focusing on action items that are attainable and determining who and what is needed to reach the action items.

Value	The People We Serve		Value	The Workforce	
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Clear	Is this document clear and easy to understand to the people we serve?	 	Clear	Is this document clear and easy to understand to the workforce? Is the purpose of the document clear and easy to explain?	   
Comprehensive	Is this document comprehensive and provide sufficient information to the people we serve?	 	Comprehensive	Is this document comprehensive and provide sufficient information to the workforce? Is the information in this document comprehensive and sufficient enough for staff to explain?	   
Compressed	Is there any information/phrasing in this document that might be unnecessarily activating to the people we serve?	 	Compressed	Is there any information/phrasing in this document that might be unnecessarily activating to the workforce? Is there any unnecessary information/phrasing in this document that might be activating for staff to explain?	   

Is information in this document available in multiple modalities? Yes | No

Can staff easily find it? Yes | No

Based on this review, I would: Pass this form | Not pass this form | Pass this form with revisions.

Access more resources like these at TraumaInformedOregon.org

