



# How we note take

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## Purpose

The purpose of this tikanga is to support note taking during a monitoring hui. Note taking during a monitoring hui records the kōrero of our participant(s) and identifies who said what.

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## Our mahi as a note taker

- Record all required information in the Te Pātaka engagement record
- Record questions and responses
- Prepare notes for coding.

## How we prepare for note taking

### Creating an engagement record

During Hōkaitanga we create engagement records in Te Pātaka when planning and confirming engagements. Te Pātaka requires us to provide specific demographic information based on who we are speaking with.

There are several required fields in the demographic sections that must be filled in. These are relevant for our annual reporting statistics. This includes the demographics of tamariki and rangatahi of whānau and caregivers. We may not interview them, however we need to know their details so this is included in our annual reports.

For example, when we answer our big question on equity, we need to know if the caregiver is Māori and whether they are caring for tamariki Māori. If they are then we connect this information to see if they are being treated in an equitable way.

This is also necessary when we answer our big question on whether disabled tamariki and rangatahi are being treated equitably. Te Pātaka will not let you move forward without the information being completed. Examples of what needs to be recorded are in the user guide.

## **How we note take for our monitoring hui**

Monitoring notes are recorded in Te Pātaka. During the monitoring hui record all questions or pātai pākiki identifiers and responses to give context to the kōrero.

It's important not to record your own perspective and bias of how you see behaviour or emotion during the hui. The note taker supports the kōrero and asks questions to make sure all the areas have been covered during the conversation.

The note taker:

- records only what is said, focusing on key points in relation to the pātai pākiki, system elements and outcomes
- uses first person language - this allows for the note taking to be precise when participants are providing their kōrero e.g. I, my, we, us
- captures words and language the participant/s is using. Capturing this reduces the risk of us unintentionally adding our interpretation to their kōrero
- records comments from participants about use of their information.

## **Using quotes and using square brackets**

It is important during our note taking that we capture some quotes to directly relay the words of the participant when we share back to the community and agencies. This is how we care for the voices of our participants.

If a participant indicates that they do not want direct quotes from their kōrero to be used, monitors will bring this to the attention of D&I through a conversation and an email. D&I will annotate the interview to indicate the participant's preference.

## **Using Quotes ""**

When you capture quotes that we might want to use in our reports, identify this by using quotation marks during the hui. You can ask the participant to repeat or clarify what you have captured is correct and advise them that you want to record it as a quote.

## **Using square brackets [ ]**

After the hui, if you find a quote is not comprehensive and you are unable to clarify with the participant, then you can add additional words to give context to the quote. The additional words must have square brackets to identify the amendment.

e.g., “I went down there to play” and “I went down there [the park] to play”.

## **What we do after the kōrero**

### **We tidy our notes to get them ready for analysis**

As soon as practicable after the hui, we tidy our raw notes in Te Pātaka to get them ready for coding. This means we only keep information that will help us to analyse what is working well in the care system and what needs to improve.

We remove:

- any pātai pākiki identifiers that have been used and replace these with the pātai that was asked
- any information that is not relevant to the purposes of monitoring
- the names of people

We keep:

- kaimahi role titles
- names of iwi/Māori organisations
- agencies
- schools
- health care providers

It is important that this information is kept so we can analyse it accurately and find themes across different groups. While we keep specific identifiable information in our notes for analysis purposes, information we release publicly (for example, sharing back reports or annual reports), undergoes a privacy check to make sure published documents do not identify any individuals.

Please refer to the Caring for Data and Information Handbook for more information on keeping the privacy of the people we kōrero with.

See the table below for further guidance to help you decide what to keep, and what to change.

<b>This...</b>	<b>... becomes this</b>	<b>Note</b>
Matua David	[Teacher aide]	We never keep personal names recorded.
Bradley	[rangatahi] or [tamariki]	We never keep personal names recorded.
Ngāpuhi student study group	Leave as Ngāpuhi student study group	We can tell Ngāpuhi who we have spoken to from Ngāpuhi
Ngāpuhi Health Services	Leave as Ngāpuhi health services	As above
Rotorua OT site	No change	We can redact during publication if required
Wellington College	Wellington College	We can redact during pre-publication
Names of organisations that agencies are working with e.g. Well Stop, OHF, CCS disability, Ngāti Awa Social Services, Ngāi Tahu	No change	We can redact during pre-publication
Small community name e.g., Taihape	Taihape	We can redact during pre-publication
Large community name e.g., Auckland	Auckland	We can redact during pre-publication
Sarah	[Rotorua OT Social Worker]	We never keep personal names recorded.
SP1	Tell me about any initiatives/relationships you	We only use identifiers for quicker note taking.

	have within your region? How are these working?	Identifiers need to be removed from our prepared notes.
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**We QA our notes**

When notes have been tidied and de-personalised, monitor’s change the status of the notes to “ready for review”. Senior monitors are then responsible for the QA of the notes from the visit. Senior monitors are not to QA their own notes. The QA process includes checking that notes are tidy, and no information has been left in the notes by error.

Visit monitoring managers are responsible for the review of a small sample of each of the team’s notes prior to the notes being uploaded to NVivo for analysis.

**We upload our notes**

Following the QA process, the status of the notes is changed to “completed”. When the status of the notes has been changed, the “Export Notes” function becomes available. Notes are then exported from Te Pātaka as a word document and uploaded to SharePoint. Monitors are responsible for uploading notes into the relevant SharePoint folder. Te Pātaka will produce a document title automatically, which includes a unique identifier that becomes the name of our prepared note document.

All notes are to be uploaded to SharePoint before the end of week 6. Any interviews uploaded after this will not be included in the analysis for the visit as this will impact on the reporting timeframes for D&I.

**Changes to notes**

If notes require editing during the coding process, a member of the D&I team will contact the monitor responsible for the notes and request the change. The monitor is responsible for making the changes to the notes, exporting and re-uploading to the SharePoint folder.

**Locking notes**

When advised by D&I that notes have been coded in NVivo, the status of the notes is changed to “Locked” by the author, and they can no longer be edited.

**Rauemi - supporting documents and resources**

[Caring for Data and Information Handbook](#)

[Te Pātaka user guides](#)