

Your recordkeeping starter kit

Remove the emotion. Track the data.

A practical routine for dated notes and supporting files. Use it on paper or alongside Custody Folio. You do not need the other parent to participate.

1

Separate the dates

Record when the event happened and when you wrote the note. If a time is approximate, label it approximate.

2

Describe what you observed

Write the actions, times, places, and amounts you know. Identify secondhand information as secondhand. Leave unknown details unknown.

3

Keep the source with the note

Keep the original file and reference its name or location. A summary helps you find a source; it does not replace it.

4

Review before sharing

Check dates, sources, and wording. Confirm the recipient and review the selected records before creating a report.

Inside: a fictional example, a reusable note page, and a short review checklist.

A note someone can follow

Fictional demonstration. All people, events, and details below are invented.

EVENT DATE AND TIME

September 1, 2026, at 6:15 PM

NOTE CREATED

September 1, 2026, at 7:10 PM

NEUTRAL TITLE

Tuesday pickup

WHAT I OBSERVED

Pickup was scheduled for 6:00 PM. I arrived at the community center entrance at 5:55 PM. The other parent arrived at 6:15 PM. The pickup was completed.

SUPPORTING SOURCE

Reference: scheduling-message-sept-1.txt. The message gives the planned 6:00 PM pickup time. It does not establish the actual arrival time.

WHAT I DO NOT KNOW

I do not know why the other parent arrived at 6:15 PM.

Why this is useful

The note separates the plan from the observation and identifies what the supporting source actually contains. It avoids guessing about intent.

A note or PDF does not verify an allegation or guarantee acceptance in a legal proceeding.

One dated record

Type into the fields in a compatible PDF reader, or print and write by hand.

EVENT DATE / TIME (MARK APPROXIMATE TIMES)

NOTE CREATED DATE / TIME

NEUTRAL TITLE

WHAT HAPPENED? WHAT DID YOU DIRECTLY OBSERVE?

SOURCE FILE NAME / LOCATION AND WHAT IT SUPPORTS

UNKNOWN DETAILS / QUESTIONS TO CLARIFY

Save a separate copy for each event. Completed worksheets may contain private information.

Make the next review easier

Use this checklist weekly, or before preparing a report.

- ☐ **Dates are clear**
Event dates and note-created dates are distinct. Approximate times are labeled.
- ☐ **Wording is factual**
I can tell observations, quotations, secondhand information, and unknowns apart.
- ☐ **Sources are findable**
Original files are saved. References point to the right source and describe what it supports.
- ☐ **Entries are consistent**
I checked for duplicates and used the same routine for completed, changed, or missed events.
- ☐ **Sharing is deliberate**
I reviewed the date range, included files, and recipient before sharing.

Put the routine to work

Custody Folio helps organize notes, pictures, and timeline reports. See the product walkthrough and try the web app at custodyfolio.com.

Keep personal case details out of public posts and product feedback. Use fictional examples.