Practitioner Case Checklist

This checklist is intended to help support Adult Care practitioners to record and update information in a person's record.

A person's details should be regularly reviewed and updated in order to comply with information governance and provide the best customer experience.

You should review and update all details on a person's record – not just those prompted within workflow steps (those marked with the **blue cog** symbol).

The checklist also includes recording and ending worker and team relationships, along with other professionals and organisations relationships and when to propose a full case closure.

The checklist does not cover workflow steps.

Within this guide there are two versions of the same checklist –

1. A detailed checklist which covers recording activity, where to add/update, and a list of relevant guides which will give full details about the recording activity, including how to record or update the information (use pages 2 – 5 of this guide)

2. A simplified checklist which is just a list of the recording activity which can be used as a reminder (use only page 6 of this guide)

You can decide which version of the checklist works for you.

The checklist should be used for every case you work on – for every person you work with.

Detailed Practitioner Case Checklist

Recording Activity	Where to add/update	Guides
Adding your Worker relationship Usually recorded by your manager. If not, you will need to record this yourself.	Recorded via **Person details > Worker relationships** (extended sidebar menu)**.** There should only ever be one Key Worker (Adult Care) recorded on each case. Additional workers should be added with the relevant role e.g. Involved Worker	Worker Relationships
Adding your Team Usually recorded by CSC or Business Support when recording a contact. If not, you will need to record this yourself.	Recorded via **Person details > Organisational relationships** (extended sidebar menu). There should always be a Key Team (Adult Care) recorded on an open case. Other teams should have an appropriate role e.g. Involved Team.	Organisational Relationships
Notes Warning notes should always be discussed and agreed by your line manager before being recorded.	Recorded via **Person details > Notes** (extended sidebar menu). Recorded to display warning messages or general information on the Person summary screen.	Notes
Current communication needs	Recorded via the **Current communication needs** section on the Person summary screen. Recorded to comply with the Accessible Information Standard. Supplementary information can be recorded in the **B: Communication Needs** note type.	Current Communication Needs Notes

Recording Activity	Where to add/update	Guides
Service user group Also known as the Primary Support Reason	Recorded via **Person details > Service user groups** (extended sidebar menu). The primary support reason should represent the primary reason for involvement.	Service User Groups
Employment status	Recorded via **Person details > Employment status** (extended sidebar menu).	Employment Status
References	Recorded via **Person details > References** (extended sidebar menu). This includes NHS and National Insurance Number.	References
Other Person details	Recorded via **Person details > relevant option in extended sidebar menu** You should always review and update all details on the person's record	Basic Details Addresses Contact Details – Telephone Numbers and Email Address Other Names
Access Information for Property Useful access details including location of and number for key safe	Recorded via **Person details > Addresses** (extended sidebar menu). You must use the **Edit Pencil** icon  against the current address to record the 'Access notes'.	Addresses
Health Conditions	Recorded via **Health > Conditions/ Disabilities** (extended sidebar menu). **Note:** This information does not pull through from or to your assessment.	Health Conditions

Recording Activity	Where to add/update	Guides
Hospital stays Hospital practitioners only – usually started by Business Support	Recorded via **Health > Hospital stays** (extended sidebar menu). Add if previously missed. Update and end at point of discharge/end of hospital involvement.	Hospital Stays
Individual Named GP	Recorded via **Person details > GP** (extended sidebar menu). Recorded along with the GP Surgery (Organisational Relationship)	GP Details
Other Professionals	Recorded via **Person details > Worker relationships** (extended sidebar menu)**.**	Worker Relationships
GP Surgery	Recorded via **Person details > Organisational relationships** (extended sidebar menu). Even if a named GP has been recorded the GP Surgery should also be record as an Organisational Relationship. Should also be used to record if GP details are not known or if the person is not registered with a GP.	GP Details
Other Organisations	Recorded via **Person details > Organisational relationships** (extended sidebar menu).	Organisational Relationships
Personal relationships	Recorded via **Person details > Personal relationships** (extended sidebar menu). Once added, use the **Edit Pencil** icon beside the relevant relationship to add any roles **Note:** If a personal relationship has a role Lasting Power of Attorney this should also be added as a Legal Status	Personal Relationships Creating a Person Genograms Legal Status

Recording Activity	Where to add/update	Guides
Ending your Worker relationship	Ended via **Person details > Worker relationships** (extended sidebar menu). You should always end your own Worker relationship when your involvement with the case is over.	Worker Relationships
Ending your Team This will be completed by Business Support if a full case closure is taking place.	Ended via **Person details > Organisational relationships** (extended sidebar menu). The team involvement should remain if the case is staying open to your team for review, or the case is transferring to another worker in your team.	Organisational Relationships
Proposing a Case Closure Full case closures only – not needed if a case has ongoing open services or is open to other workers/teams.	At the end of your involvement with a case you must decide if a full case closure is required. This is completed by recording an **Adult Proposed Case Closure**. This can be selected as a next action from most workflow steps and is also available from the **Start > New...** sidebar menu.	Case Closures – Full, Team and Involvement
Unfinished/Timed out Case notes Especially important at the end of your involvement, but case notes should be finished throughout your case involvement	Finished via **Case notes** (sidebar menu) or from the **Unfinished case notes** section on your **Homepage**. To ensure information on a person's record is accurate and up to date you must ensure all case notes for that person are finished.	Finishing Timed Out Case Notes

Simplified Practitioner Case Checklist	
Check/Add your Worker relationship	
Check/Add your Team (Organisational relationship)	
Notes	
Current communication needs *(To comply with Accessible Information Standard)*	
Service user group *(Also known as the Primary Support Reason)*	
Employment status	
References *(includes NHS and National Insurance Number)*	
Other Person details *(all of the extended Person details menu)*	
Access Information for Property *(e.g. location of and number for key safe)*	
Health Conditions	
Hospital stays *(Hospital practitioners only)*	
Individual Named GP	
Other Professionals	
GP Surgery	
Other Organisations	
Personal relationships *(and roles e.g. Next of Kin)*	
Ending your Worker relationship	
Ending your Team (Organisational relationship) *(BS for full case closures)*	
Proposing a Case Closure *(Full case closures only)*	
Unfinished/Timed out Case notes	