

Instructions for Participant Files

A paper file must be set up for every project participant.

All documentation relating to the participant should be included, filed within sections, in date order with the most recent on top. The only exception is the referral form, which should always be at the front of the General section.

Section 1 - Contact Sheets

To record every contact with or related to the participant – contact includes meeting, letter, e-mail, phone call, activity, visit. Only a brief note of the contact is required on the contact sheet and further details put in the relevant section where necessary. The contact sheet must be signed and dated every time an entry is made.

It is not necessary to record "File update" when putting information into the file.

Section 2 - General

Referral form – always at the front of the general section

Participant Questionnaire } these are completed on behalf of the team as a
Parental Questionnaire } whole, not for any one area of work and should be in
the general section

Any other documents that relate to the participant in general, rather than to any one particular area of work eg school annual reviews

Section 3 - Risk Assessments

This section is for risk assessment information regarding the participant, not an activity, eg medical needs, behaviour, regardless of who they are prepared by.

Activity risk assessments are files separately.

Other Individual Sections (as appropriate)

Duke of Edinburgh Award

Independent Living Skills

Peer Mentor Support

Person Centred Planning/Family Support

Psychology Support

Transition

Youth Inclusion/Leisure

Each section should include copies of:

All letters sent and received, all e-mails sent and received, visit reports for every visit, work plan(s), activity reports for every activity, progress reviews, evaluations, anything else that is produced relating to participant activity, eg community maps, person centred tools/plan, transition plans, training course outline, activity programme. If a participant has participated in a group activity, a report of the group activity should be filed, preferably with a note of the how individual participant engaged with the activity.

All must be filed in date order with the most recent on top.

Copies of any photographs taken should also be put in the file; likewise, if a CD or DVD has been produced as part of the activity.

Within each section, further dividers may be inserted as appropriate – but there should be consistency between participants.