



ASK US
Advice toolkit

Template: Notes and action plan for using online information and resources

This resource is part of the Ask Us Advice Toolkit. For more information or queries on any of the topics covered in this toolkit, or to find out about training and consultancy the Ask Us partners can offer please contact enquiries@1625ip.co.uk



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Template: Notes and action plan for using online information and resources

“I struggle with writing so it was great the Ask Us worker could help me write my benefits form. I couldn't have done it on my own.” (Young person - evaluation report)

This template can help you and your client to keep notes and details on information you find online

Template 1- Identifying Key Issues

Benefits	
Employment/Work	
Debt and Money	
Consumer (Shopping including Utility Bills)	
Housing	
Family	
Law and Courts	
Immigration	
Health	



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Template 2- finding information

This first template can help you to break down the issue and identify sources of information

What is the issue you'd like help with?	Name of website/resource	What does this website say about the issue?	How does this apply to me?



Template 3- action planning

Using the information in the table, make a list of the steps you need to take. It's important to think about:

- Are there any deadlines for these actions? If so, make sure you keep on track to meet them
- Are there any consequences for not acting or acting too late?
- What does the client have a right to in this situation?
- What is the client responsible for?

Client action plan

What will I do?	How do I do it?	Why do I need to do this?	When do I need to do it?	What might stop me from doing this?	Who can help me do it?



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Support worker action plan

What will you do?	When will you do it?	What do you need from your client?	When will you next contact your client?