



ASK US
Advice toolkit

CHECKLIST FOR APPOINTMENT

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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CHECKLIST FOR APPOINTMENT

Process	Y/N
Diagnosis/Exploration of issue	
Key Issues identified?	
Checked for an emergency?	
Risk Assessment (refer to notes on guidance)	
Emergency	
Consequences	
Capacity	
Information and information sources	
Research the Key Issues	
Use Ask Us template for recording online resources in the appointment	
Copy taken for system notes?	
Options:	
Referral? Note down action(s)	
Signpost?	



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Information?	
Prompts for case recording: <ul style="list-style-type: none">• What is the client's key issue(s)• What outcome the client wants to achieve• Barriers to achieving this?• Information and options (recording the information sources)• What information did you give the client in the appointment?• Has the client given you consent to act on their behalf?• Decisions made• What action has been taken• What further action has been agreed, if any (Agreed action plan)	