**AIS adult safeguarding checklist – allocated cases – recorded by allocated worker**

|  |  |  |
| --- | --- | --- |
| **Action** | **By who** | **Guidance** |
| * Receive, screen and record referral info. Consider consultation panel below * Create contact form * Complete contact information | Allocated worker |  |
| * Is panel discussion required for decision to raise safeguarding concern? * Create / complete Safeguarding panel request case note * Send email request to [adultsafeguardingpanel@croydon.gov.uk](mailto:adultsafeguardingpanel@croydon.gov.uk) | Allocated worker |  |
| * Add safeguarding involvement for self while completing safeguarding triage * Add triage SAM involvement while acting as SAM for safeguarding triage | Allocated worker /  SAM |  |
| * Create / complete safeguarding concern case note * Workflow safeguarding concern case note to self | Allocated worker |  |
| * Create s/g assessment form * Complete start dates on front page of s/g assessment form * Enter referral information to s/g assessment form (reason for concern) | Allocated worker |  |
| * Record initial SAM on safeguarding assessment form (duty notes) * Complete safeguarding assessment form * Record final SAM on safeguarding assessment form (authorisation) | Allocated worker / SAM |  |
| * Is panel discussion required for decision to conduct S42 enquiry? * Create / complete Safeguarding panel request case note * Send email request to [adultsafeguardingpanel@croydon.gov.uk](mailto:adultsafeguardingpanel@croydon.gov.uk) | Allocated worker |  |
| * Create safeguarding enquiry needed case note (RAG) if enquiry agreed * Workflow s/g enquiry needed case note to S42 enquiry team (2165370) * Workflow s/g enquiry needed case note to business support (2210883) | SAM |  |
| * Close safeguarding involvement for self when safeguarding triage ends * Close triage SAM involvement when acting as SAM for safeguarding triage has ended * Revert to case management | Allocated worker /  SAM |  |