**AIS adult safeguarding checklist – unallocated cases – via contact centre**

|  |  |  |
| --- | --- | --- |
| **Action** | **By who** | **Guidance** |
| * Receive, screen and copy referral info * Create contact form * Complete contact information | CSA |  |
| * Create s/g assessment form * Complete start dates on front page of s/g assessment form * Copy referral information to s/g assessment form (reason for concern) | CSA |  |
| * Create safeguarding concern case note * Workflow safeguarding concern case note to CDT triage * No further action for contact centre | CSA |  |
| * Screen safeguarding referral information * Allocate concern to CDT worker * Create Safeguarding centralised duty worker involvement | CDT lead / CDT worker |  |
| * Record initial triage SAM on safeguarding assessment form (duty notes) * Complete safeguarding assessment form, must include outcome * Record final triage SAM on safeguarding assessment form (authorisation) * Close safeguarding centralised duty worker involvement to CDT worker | CDT  worker / SAM |  |
| * Create safeguarding enquiry needed case note (RAG) if enquiry agreed * Workflow s/g enquiry needed case note to S42 enquiry team or IRT * Workflow s/g enquiry needed case note to business support | CDT lead |  |
| * Start SA summary – s/g enquiry and link incident & case notes * Record first SAM discussion on s/g enquiry SAM case note * Record further information gathering on safeguarding case notes | S42 or IRT SAM / worker |  |
| * Create safeguarding team allocation needed case note * Workflow s/g allocation needed case note to team manager * E-mail to team manager to alert need for allocation (disability teams) | S42 or IRT lead |  |
| * Create safeguarding enquiry officer involvement * Create start safeguarding enquiry case note * Workflow start safeguarding enquiry case note to allocated worker | S42 or community team mgr. |  |
| * Check s/g assessment form & SA summary / incident – review all info * Continue s/g enquiry within SA summary, including mandatory case notes * Organise formal meetings as required, record on s/g enquiry in SA summary * Request and record further SAM discussions as required | Allocated worker |  |
| * Check / correct final information on SA incident. Add end date/status * Add final outcome to safeguarding risk assessment case note * Record final SAM and outcome on s/g enquiry within SA summary | Allocated worker |  |
| * Complete analysis of evidence and learning case note (optional) * Create safeguarding enquiry closure request case note * Workflow safeguarding enquiry closure request case note to manager | Allocated worker |  |
| * Create safeguarding enquiry closure authorisation or * Create safeguarding enquiry closure rejection * Workflow s/g enquiry closure authorisation or rejection to allocated worker | Team manager |  |
| * Complete safeguarding enquiry within SA summary – end date * Close safeguarding enquiry officer involvement | Allocated worker | See above |