

Three monthly Case Recording Summary Practice Guidance and Template

What is a three-monthly case recording summary?

A three-monthly case recording summary is a concise overview of any significant events and changes that have taken place in the child or young person's life over a period of three months, including analysis of progress against the plan and outstanding actions.

It should provide a succinct summary of the work undertaken, specifically linking progress to the recommendation/outcomes of the child's plan; whilst promoting accountability, an understanding of progress and continued planning.

It should also highlight fresh issues that have emerged, both strengths as well as concerns, and reflect how these have been dealt with, as well as acknowledging the impact (or otherwise) of any new issues on the overall status and nature of the case management.

The summary helps to bring together the outcomes of all the information and actions in relation to the child, young person and family and should analyse and evaluate the progress of the support and intervention, including the child, young people and family's level of engagement with the intervention.

The purpose of the three monthly case recording summary:

The purpose of the case recording summary is to:

- Reflect on practice
- Provide an overview of what has happened over the previous three months
- Better understand the child's story and their journey
- Demonstrate continuous assessment of the needs of the child and young person
- Review progress against the plan and to address the needs of the child and young person to improve outcomes
- Identify patterns and triggers and to plan future interventions based on this knowledge
- Enable any third party (EDT, duty worker, auditor, inspector) to quickly establish the plan, the progress and key issues for the child.

The three-monthly summary should address what someone who knows nothing about the child or young person needs to know so that they can make the right decision and take the correct action?

What must be included in the three-monthly case recording summary?

Practitioners must record the following details:

- Significant events
- Changes to the plan
- Analysis of progress against the plan
- Consideration given to the child's needs regarding their health, education, welfare, social, environment etc.

- Summary of other relevant agencies and the support they provide to the child and family
- Evidence about the child's story and their journey
- The child's views, wishes and feelings
- The future plan for the child, including who is responsible for taking what action, when and how success will be measured?
- The contingency plan

Quality of recording

In accordance with Gloucestershire's Practice Fundamentals for Children's Services (May 2020) the three-monthly case recording summary will:

- Be written in a clear and concise way with the child in mind
- Be up to date, accurate, comprehensive and well written in plain English without the use of jargon or abbreviations
- Be personal to the child and not simply a duplicate of sibling records
- Put the child at the centre and must reflect and have regard to 'what life is like for the child'
- Consider how the child may come back as an adult and read their file. They need to be able to understand their history, journey and the decisions that were made for them and why.

'It is important that children's and young people's case records are well written as it is their life you are writing about. They might want to access their files at 18 and see that they actually mattered enough to have a well evidenced, correct case file. It is important as the file is going to be accessed by more than one worker and in case of a change in worker. It is important that the new worker is up to date.' (Alice 22)

*A message from an Ambassador for Vulnerable Children & Young People
(Gloucestershire Social Work Practice Standards)*

Three-Monthly Case Recording Summary Outline of Information to be Recorded

The Three-monthly case recording summary should be short, short concise and include the following outline:

- 1. Who am I?**
Write a short profile about me, even better - write it with me. What do I look like, how old am I, what is my culture, ethnicity and religion, do I have any health needs or a disability, how do I communicate, do I have any additional needs and what are my likes, dislikes, wishes and feelings?
- 2. Who are my family?** *Include my Mother, Father, Siblings and any other relevant family members or friends. Do my family members have any communication needs and what language do they speak if English isn't their first language?*
- 3. Who do I live with?** *Parent(s), family member(s), foster carer etc.*
- 4. Who has Parental Responsibility for me?** *Is it my Mother, Father, family member or the Local Authority?*
- 5. What key information do people need to know if I am in care?** *Outline the child's legal status, care, placement and permanence plan, date of last PEP, annual health assessment and dental check.*
- 6. Who is working with me and my family?** *List the names of Professionals, Agencies/Services, with Contact details. Including my Foster Carer's details and the name and contact details for the Independent Fostering Agency if they are not in-house.*
- 7. Why are Children's Services working with me and my parent/carers?** *Add a short summary with key information, including a brief history which gives the overview of the support, protection or care plan for the child (no more than ten lines).*
- 8. What actions and developments have taken place with me during the last three months?** *Outline any significant events that have occurred, what progress has been made against the agreed plan and have any changes been made to the child's plan?)*
- 9. What difference has this made for me?** *How has the child's lived experience changed, what difference has this made and is the child currently safe and well? If not, why not?)*
- 10. What needs to happen next for me?** *What are the outstanding tasks and future plans that are required to improve the child's outcomes? Set out what actions are required, by whom, by when and how this will be reviewed.)*
- 11. What is my Safety/Contingency Plan?** *If the plan for the child is not progressing, if there is drift or delay or additional concerns arise what is the contingency plan to address this?*
- 12. Who can help me and my family at a time of crisis?** *Who can look after the child if the parent/main carer suddenly cannot, for example through ill health, escalating risks etc. What is their name, address and telephone number? Does this person know they might be called about me in these circumstances?*