

Appendix A: Guidance Notes

You are the coordinator For You

- You will receive a partially completed form or you will be starting a new one from scratch.
- Blank forms can be found on the With You For You website.
- During your discussion/s with the customer, clarify the current situation. Use the holistic prompt sheet for this.
- Always remember to engage other partner agencies if you feel that the customer's situation is outwith your knowledge base.
- Ensure that you ask the customer whether they consent to share information and record any exclusions.
- Once you have a good understanding of the customer's situation, complete the eligibility criteria and risk section. Refer to the eligibility criteria staff guide.
- Write a summary of the current situation, working with the customer to agree their goals and linked needs.
- Once you have agreed the goals and needs with the customer, record these in the goals and linked needs boxes.
- Agree actions with the relevant partners and the customer. Linked to each individual goal, record who will complete each action and the date that this will be achieved.
- The Linked information table allows you to say which other relevant documents exist for the customer e.g. carer's assessment or other specialist assessment.
- Agree a review date with the customer and record this in the box under the linked information table.
- Discuss information sharing with the customer, give them the leaflet and talk them through it. Record the customer's level of consent on the form.
- Ensure you and the customer sign and date the Understanding With You Form.
- Finally ask the customer if they are willing to be part of the feedback process, explaining simply that a member of staff will call them to ensure they got what was agreed, and record their decision.