ASK US
Advice toolkit

DIAGNOSIS - INFORMATION

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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Diagnosis/ Exploration	This is the core of your notes. This will include; An overview of the client's situation, their key issues and any emergencies or deadlines. This should have a clear statement of what the key issue is. Clearly state when action needs to be taken to meet deadlines or emergencies and note that this was discussed with the client.
Information and information sources	This is where you need to record all the facts relevant to the case. Names, addresses, telephone numbers, account details. Any letters given by the client should be recorded and kept with the case file. When researching for information use the key issues as a reference point. Make sure to copy and paste your information sources into your notes, or note down the name of a manager who gave you the specialist information. When giving a client a printed information sheet, highlight the parts that are relevant to them.
Options	What options were discussed with your client? Supporting your client to make an informed decision about their situation is important and can be hard to document. List the options that were explored and the one your client chose.
Actions	Finally, complete your notes with next steps or agreed actions. What has been agreed between yourself, the client, other agencies etc. Does everyone know what they are doing and what is expected of them and when? Create a small agreed action plan or to do list. Give one to the client and upload the other to their file.