

Care-team setup worksheet

Prepare this with the participant in a way that works for them. Add space or repeat a section as needed.
Mark uncertain details for checking and record who has agreed to help.

Person this is for: [preferred name]

Prepared with: [people involved and how the participant took part]

Updated: [date] | Check again: [date or change that prompts a review]

WHAT MATTERS NOW

Current priority, in the person's words where possible: [...]

Communication preferences and chosen support for decisions: [...]

PEOPLE AND AGREED RESPONSIBILITIES

Name / role / agreed contribution / best contact method: [...]

Decisions or permissions that still need checking: [...]

INFORMATION AND ACCESS

Who needs which information, for what purpose: [...]

Sharing agreed with whom, on what basis and when: [...]

Shared location / who maintains it / how to request a correction: [...]

CURRENT DOCUMENTS AND INSTRUCTIONS

Document title / author or provider / version or date / location: [...]

Who needs access and who will confirm it is current: [...]

Missing or conflicting information and accepted follow-up: [...]

NEXT ACTION - REPEAT FOR EACH AGREED STEP

Action and result needed: [...]

Owner who has accepted it / date or trigger agreed: [...]

Waiting on / next check / who needs the result: [...]

A practical coordination aid. Use it alongside the current support plans, provider induction, professional instructions and agreed emergency arrangements. Keep completed copies private and share them only with the agreed people.

Check the setup together

Use this to check the coordination arrangements. A completed checklist does not confirm that a worker is ready to provide support.

PARTICIPANT AND SHARING

- ☐ The priority reflects what the participant wants, with their chosen support for communication and decisions.
- ☐ The people involved understand what they have agreed to contribute and which decisions need the participant or an appropriately authorised person.
- ☐ Sharing choices, recipients and actual access settings have been checked. Private information is kept out of open invitations or public links.

INFORMATION PEOPLE CAN USE

- ☐ Current source plans and relevant instructions can be found by the people who need them. A short summary points to those sources.
- ☐ Necessary information, relevant risks, provider induction and any required training are addressed before the relevant support is provided.
- ☐ Missing information or conflicting instructions are recorded, with an agreed person to clarify them and a contact route if support is affected.

FOLLOW-THROUGH

- ☐ Each next action has an accepted owner, a clear result and an agreed date or trigger. Unaccepted actions are marked as unassigned.
- ☐ People know how to report a change, request a correction or raise an unanswered question, including if they cannot use the shared tool.
- ☐ A review point and the usual urgent or emergency contact arrangements are clear. The checklist or app is not the emergency contact route.

Still to resolve / agreed contact / next check: [...]

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Invite a useful contribution

Send this privately to an agreed recipient. Check their identity and the sharing arrangements first; the initial message does not need sensitive details.

Hi [name],

We are organising [brief description of the coordination work] with [participant / chosen supporter, as appropriate].

Would you be able to [specific action and result needed] by [date or trigger]? Please let us know if that timing or request needs changing.

We are keeping the agreed information in [shared location]. We can arrange access to the information you need for this contribution, or agree another secure way to share it.

Please reply to confirm whether you can take this on. If something is missing or unclear, contact [agreed person and contact method].

Thanks,

[name]

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