

Copyable care-team update

Use these prompts when support information changes or at a check-in rhythm that suits your team. Add the context needed so people can understand and act.

Update prepared on / by / intended readers:

What changed and when / participant's view or decision:

Current confirmed information / source title, version and effective date / confirmed by:

Still uncertain or waiting / who is checking / agreed contact or fallback:

Next action / person who accepted it, or not yet agreed / needed date or trigger / next check:

Where intended readers can open the full source / any access gap / handover checked with:

Relevant detail or additional context needed:

Check the participant's sharing choices and the current source before sending. Communicate important changes when they need attention; do not wait for a scheduled update. An urgent concern needs the agreed immediate contact route.

Current picture for someone joining

Adapt this when a worker or covering person joins. Confirm the participant's sharing choices, the relevant current sources and how the person can access them. The note does not replace full instructions or the provider's induction.

Subject: Current information for [name or agreed reference] - checked [date]

Hi [name],

You are supporting [name] with [agreed work / shift or visit]. Their current priorities and communication preferences relevant to this work are [details].

Current confirmed information: [relevant summary / source title, version and effective date / confirmed by whom].
Full source and agreed access: [location or method].

What changed recently: [change and effective date / no relevant change known]. Still uncertain or waiting: [issue, who is checking and agreed contact or fallback].

Next action and acceptance: [action / accepted by whom and agreed date or trigger / acceptance still needed / next check]. Please confirm you can open the current source and tell [contact] if anything is unclear or conflicts with your instructions or training before the affected work.

For an urgent concern, use [agreed immediate contact or emergency route]. Do not wait for a reply to this note or chat.

Thanks, [name / role]

Copyable chat agreement

Adapt with the participant and the people using the chat. Confirm contact routes, membership and who will keep agreed information current.

Purpose and intended members: [what we use this chat for / names or roles agreed with the participant].

Current agreed information is kept at [place / source or version]. [People or roles] maintain their parts. Proposed or unconfirmed changes stay labelled until the responsible person confirms them.

An action is accepted when [how the person confirms]. We record [next step / accepted owner or not yet agreed / date or trigger / next check] at [place].

Availability and missed replies: [usual working/contact arrangements]. If a response is needed and does not arrive by [agreed point or trigger], use [agreed fallback]. For someone not using this chat, [agreed accessible alternative and who keeps it current].

Sharing and membership: [person or role] reviews members, history sharing and linked-file access with the participant's choices and relevant authority. Check before sharing reports, plan pages, images or other sensitive information. Explain any legal obligation that affects an agreed restriction.

Urgent concerns use [agreed immediate contact or emergency route]. A chat message, read receipt or priority label is not a promise of immediate response.

Review this agreement when the work, participant's choices or team changes. Providers keep the professional records they are responsible for in their appropriate systems.