

Recommendation-to-action record

Keep the current clinician-authored instructions attached or linked. Do not invent or shorten clinical instructions to fit this card.

Participant / preferred name and date:

What the participant wants help with, in their words:

What they agree can be shared, with whom and why:

Clinician name, role and contact:

Original recommendation title, date, version and location:

Everyday situation this recommendation applies to:

Specific action confirmed by the clinician as suitable for this worker:

Worker / provider and confirmation they accept this responsibility:

Training, demonstration, competence or supervision needed:

Who confirms readiness, and when:

Unanswered questions / what must wait for clarification:

Clinician's limits, stop guidance and contact route: see

Feedback requested by the clinician and where to send it:

Review date / person responsible for checking the current version:

Status: awaiting clarification / preparation needed / confirmed ready / under review

Optional coordination tool. Not an NDIA form, clinical instruction or funding approval.

Store completed copies appropriately and share only with the people who need them.

Full guide and official sources: <https://www.kinovo.com.au/resources/share-therapy-recommendations-support-workers>

Ask the clinician to clarify the handover

Use this before an unclear recommendation becomes a worker instruction. Adapt the questions to the actual activity.

Subject: Clarifying how [recommendation] applies during [everyday routine]

Hi [clinician],

With [participant's] agreement, we are organising the handover of [document and date].

They want support with [everyday goal].

The point we need clarified is [specific wording or situation].

Which parts, if any, are appropriate for this support worker to assist with?

What training, demonstration or supervision is required first?

Who should confirm the worker is ready to provide that assistance?

Please confirm any limits, when to stop, and who to contact with concerns.

What observations would be useful, and how often should we send them?

Is this the current version, and when should it be reviewed?

We have marked the unclear action as awaiting clarification.

Could you confirm the next step and an expected response date?

Thank you, [name and role]

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Factual feedback for the care team

Record relevant observations and the participant's perspective using the agreed channel. This is not a diagnosis, clinical assessment or replacement for required provider records.

Date / time / everyday setting:

Person writing this note and role:

Current recommendation referenced (title and date):

What the participant wanted to do or said about the activity:

Agreed support actually provided:

What I directly saw or heard:

Anything that made this situation different:

Participant's response or feedback, in their own words where possible:

Question for the clinician / supervisor:

Action already taken through the agreed support or incident process, if relevant:

Sent to the appropriate person by / on:

Response or clarification still needed:

Next review or check-in:

For urgent concerns, use the existing urgent or emergency pathway; do not wait for a shared note to be read.

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