



Case Summaries – Practice Guidance and Procedures

The Purpose of Case Summaries

- To provide an overview of what has happened over the previous three months to better understand the child's journey
- To support discussions in supervision over the progress of the plan and impact on the child
- To review progress against the plan and to address the needs of the child to improve outcomes and any changes
- To enable any manager, duty worker or any non-allocated worker to establish quickly, the plan, progress and issues for the child

What Should be included

- The summary should provide a succinct summary of the work undertaken, specifically linking progress to the actions and outcomes of the plan
- The summary should also highlight new issues that have emerged, both strengths as well as concerns, and reflect how these have been dealt with as well as acknowledging the impact (or otherwise) of any new issues on the overall nature of the case. The chronology should be used to inform this
- The summary helps to bring together the outcomes of all the information and actions with the child/family and reflect / analyse / evaluate upon the progress of then intervention, including the child and family's engagement with the intervention.
- A summary of other agencies involved and who provides what support to the child and family, as well as key members of the Family Network
- The Case Summary should comment on the focus of work for the forthcoming 3 months and set out key dates for upcoming reviews
- Any bottom lines (i.e. any definite no's) and the contingency plan should these occur.

Frequency of Case Summaries

- Case summaries should be written every 3 months minimum unless there is significant change in child's plan
- Where the visiting schedule is 12 weeks or more then a case summary should be completed every 6 months
- Managers will ensure the case summary is completed by the allocated worker.



Review / Contacts / References	
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