



Attachments Naming Convention V1.1

Document	Attachments Naming Convention
Purpose	Correct naming and dating of document types.
Version	V1.0
Owner	ICT Business Transformation Team
Last Updated	02/12//2022

Attachments Naming

1. When uploading **Attachments**, it is important to categorise correctly.
2. From page **3** to **10** are the names and categories that **Documents** need to be labelled as.
3. The location of these changes is within the **Attachment** record. Under **Document Type/ Document Sub Type/ Date** and finally what to name the **Document**.

Example Attachment Naming

1. An example from the list would be an **Adult Conversation Record Agreement Signature Page** that requires uploading. Will look like:

Document Type / Name	Document Type	Document Sub Type	Naming and dating Document
Adult Conversation Record Agreement Signature Page	Assessment and Care Management	Signature Page	Conversation Record Agreement signature (date of signing)

Document Type / Name	Document Type	Document Sub Type	Naming and dating Document
Adult Conversation Record Agreement Signature Page	Assessment and Care Management	Signature Page	Conversation Record Agreement signature (date of signing)
Adult care and Support Plan Agreement Signature Page	Assessment and Care Management	Signature Page	Care and Support Plan Agreement Signature (date of signing)
Adult Interim Support Plan Agreement Signature Page	Assessment and Care Management	Signature Page	Interim Support Plan Agreement Signature (date of signing)
Adult Care and Support Plan Review Agreement Signature Page	Assessment and Care Management	Signature Page	Care and Support Plan Review Agreement signature (date of signing)
Adult Consent Signature V7	Assessment and Care Management	Signature Page	Consent form signed (date of signing)
Adult Carers Assessment Agreement Signature Page	Assessment and Care Management	Signature Page	Carer's Assessment Agreement Signature (date of signing)
Accident and Incident Reports	Assessment and Care Management	Other Document	Name of report (date)
Adaptations Referral	Assessment and Care Management	Other Document	Adaptations Referral (date of referral)
Adaptations External Access Form	Assessment and Care Management	Other Document	Adaptations Referral Access Form (date of referral)

CAREDIRECTOR ATTACHMENTS NAMING CONVENTION

Adaptations Metal Handrail Form	Assessment and Care Management	Other Document	Adaptations Mental Handrail Form (date of referral)
Age UK Referral	Assessment and Care Management	Other Document	Age UK Referral (date of referral)
Allied Irish Bank Card Service User Agreement	Finance	Other Correspondence	Allied Irish Bank Card Agreement (date of referral)
Approved Mental Health Assessment Report	Assessment and Care Management	Other Document	Approved Mental Health Report (date of document)
Assessment for External Access	Assessment and Care Management	Other Document	Assessment of External Access (date of document)
Bayfields Referral	Sensory Impairment	Sensory Impairment Document	Bayfields Referral (date of referral)
Best Interest Meeting Minutes	Assessment and Care Management	Other Document	Best Interest Meeting Minutes (Date) (date of meeting)
Carers Support Plan Signature Page	Assessment and Care Management	Other Document	Carers Support Plan Agreement signature (date of signature)
Carers Conversation Record Signature Page	Assessment and Care Management	Other Document	Carers Conversation Record Agreement signature (date of signature)
Carers Alert Form	Assessment and Care Management	Other Document	Carers Alert form (date of signature)

CAREDIRECTOR ATTACHMENTS NAMING CONVENTION

Care Planning Meeting minutes	Assessment and Care Management	Other Document	Care Planning Meeting Minutes (Date) (date of meeting)
Certificate of Visual Impairment	Sensory Impairment	CVI	CVI (insert registration details SI or SSI & date of registration) (date of registration)
Client Annual Reviews (from providers/schools etc)	Assessment and Care Management	Other Document	Annual Review (provider name & date of review) date of review
Clinic report letters (pre and post), psychology letter, physiotherapy letters, any NHS letters etc	Assessment and Care Management	Other Document	(Name of clinic) report / letter (date of letter)
Community OT Letters 1 to 7	Occupational Therapy	Occupational Therapy Document	COT Letter 1/2/3 etc (date of letter)
Court Attendance Notices	Legal	Other Legal Document	Court Attendance Notice (date of notice)
Court Orders	Legal	Other Legal Document	Court Order (date of order)
CVI Registration Letters	Sensory Impairment	CVI	CVI letter (insert number) (date of letter)
Direct Payment Agreement	Finance	Other Correspondence	Direct Payment Agreement signature (date of signature)
DLA Forms	Assessment and Care Management	Other Document	DLA forms (date of forms)
DOLs Documentation	DoLs	DoLs Document	DOLs (name of doc, date of doc)
ECLO Assessment	Sensory Impairment	Sensory Impairment Document	ECLO Assessment (date of assessment)

CAREDIRECTOR ATTACHMENTS NAMING CONVENTION

Education, Health and Care Plans	Assessment and Care Management	Other Document	Name of care plan (date of care plan)
Epilepsy Summary (Chart)	Assessment and Care Management	Other Document	Epilepsy Summary date of document (date of document)
GP/Nursing Reports	Assessment and Care Management	Other Document	Name of GP / Nursing Reports (date of document)
Guidelines & Recommendations (Medical)	Assessment and Care Management	Other Document	Name of Document (date of document)
Health Action Plan/ VIP Card	Assessment and Care Management	Other Document	Health Action Plan/ VIP Card (date of document)
Horizon Referral	Assessment and Care Management	Other Document	Horizon Referral date (date of referral)
Horizon Discharge Summary	Assessment and Care Management	Other Document	Horizon Discharge Summary date (date of document)
Lasting Power of Attorney Documents	Legal	Other Legal Document	LPA Finance / Health & Wellbeing (date of document)
ISF Paperwork	Finance	Information	ISF Paperwork – date (date of paperwork)
Live Well Referral	Assessment and Care Management	Other Document	Live Well Referral (date of document)

CAREDIRECTOR ATTACHMENTS NAMING CONVENTION

Medication Change/Medication List/Medication Protocol	Assessment and Care Management	Other Document	Name of document – date (date of document)
Mental Capacity Assessments/Mental Capacity Court Orders	Legal	Other Legal Document	Name of Document & date (date of document)
NHS Support Tool	Continuing Healthcare	Continuing Healthcare Document	NHS Decision Support Tool & date (date of signature)
NHS Continuing Healthcare Checklist	Continuing Healthcare	Continuing Healthcare Document	NHS CHC Checklist (date of signing)
NHS CHC Panel Outcome	Continuing Healthcare	Continuing Healthcare Document	NHS CHC Panel Outcome (date of letter)
NHS DST Review	Continuing Healthcare	Continuing Healthcare Document	NHS DST Review (date of review)
Non-Contact Letter	Assessment and Care Management	Other Document	Non-contact letter (date of letter)
Moving & Handling Plan	Assessment and Care Management	Other Document	Moving and Handling Plan (date of document)
OT Adult Conversation Record Agreement Signature Page	Occupational Therapy	Occupational Therapy Document	OT Adult Conversation Record Agreement Signature (date of signing)
OT Adult Care and Support Plan Review Agreement Signature Page	Occupational Therapy	Occupational Therapy Document	OT Adult Care and Support Plan Review Agreement (date of signing)

CAREDIRECTOR ATTACHMENTS NAMING CONVENTION

PiP Paperwork	Finance	Finance Information	PiP name of document (date of document)
PIC form	Assessment and Care Management	Other Document	PIC Referral (date of referral)
Photos or diagram of steps/access for WDH/Adaptations	Assessment and Care Management	Other Document	Photo of (insert description) (date of document)
Professionals Meeting Minutes	Assessment and Care Management	Other Document	Professionals Meeting Minutes (Date) (date of meeting)
Quote for Equipment	Occupational Therapy	Occupational Therapy Document	WES quote for Equipment (date of document)
Residential/Respite Your Provisional Financial Assessment Contribution	Finance	FA Residential	Resi/respite YPFCA signature (date of signing)
Residential/Respite Care Your Provisional Financial Assessment Contribution Top Up Fees	Finance	FA Residential	Resi/respite YPFCA top up fees signature (date of signing)
Returned signature page from Conversation record/OT Review	Occupational Therapy	Occupational Therapy Document	Conversation/OT Review Signature page (today's date)
Reviews – Other Providers	Assessment and Care Management	Other Document	Name of Provider – Review date (date of review)
Risk Assessment	Assessment and Care Management	Other Document	Risk Assessment details date (date of signature)

CAREDIRECTOR ATTACHMENTS NAMING CONVENTION

Short Breaks Panel	Assessment and Care Management	Other Document	Short Breaks Panel date (date of panel)
Speech and Language Report	Assessment and Care Management	Other Document	SALT Report (date of document)
Support Letter	Assessment and Care Management	Other Document	Support Letter - Review etc (date of letter)
Tenancy Agreement Tribunal Letters	Assessment and Care Management	Other Document	Tenancy Agreement Tribunal letter (date of letter)
Talking Newspaper Referrals	Sensory Impairment	Sensory Impairment Document	Talking Newspaper Referral (date of referral)
Wakefield Equipment Store Equipment Request Form	Occupational Therapy	Occupational Therapy document	WES equipment request form (date of referral)
Wakefield Equipment Store Equipment Justification Form	Occupational Therapy	Occupational Therapy Document	WES equipment justification form (date of referral)
WDH Adaptations	Occupational Therapy	Occupational Therapy Document	WDH Adaptations Referral (date of referral)
WDH Adaptations Feasibility Request Form	Occupational Therapy	Occupational Therapy Document	WDH Feasibility (date of document)

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WDH Adaptations Feasibility Minor Works Form	Occupational Therapy	Occupational Therapy Document	WDH Minor Works Form (date of document)
Deaf Registration Letters 1-2	Sensory Impairment	Sensory Impairment Document	Deaf Registration Letter (date of letter)
SI Letters and Template Letters	Sensory Impairment	Sensory Impairment Document	Letter (Type/Subject) (date of letter)
Deaf Registration Referral Form	Sensory Impairment	Sensory Impairment Document	Deaf Registration Referral Form (date)
Key Safe Referrals	Assessment and Care Management	Other Document	Key Safe Referral (date)
West Yorkshire Fire Service Referral	Assessment and Care Management	Other Document	WYFRS Referral (date)
RNIB Emotional Support Referral	Sensory Impairment	Sensory Impairment Document	RNIB Emotional Support Referral (date)
Wakefield Deaf Society Referral	Sensory Impairment	Sensory Impairment Document	WDS Referral (date)
WDSA (Wakefield District Sight Aid) Referral	Sensory Impairment	Sensory Impairment Document	WDSA Referral (date)

CAREDIRECTOR ATTACHMENTS NAMING CONVENTION

Deaf Registration Referral Form	Sensory Impairment	Sensory Impairment Document	Deaf Registration Referral Form (date)
Carers Contingency Plan	Assessment and Care Management	Other Document	Carers Contingency Plan (date)
Pricing Matrix	Assessment and Care Management	Other Document	Pricing Matrix (date)
Invoices / Receipts / Claims for SUs / Carers	Finance	Financial Information	Invoice or Receipt (company / name) (date)
Handyman Service (HRS)	Assessment and Care Management	Other Document	Referral Handyman Services (date)

Version Control

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	02/12/2022
V1.1	ADDED IN ADDITIONAL AREAS	PETE KING	06/12/2022