

OA Day Care	OA Residential Care	Domiciliary Services	DMH Day Services	DMH Supported Living	DMH Residential Services	EIA'd
x	✓	x	x	x	x	✓

# S10 SERVICE USER FILES

## POLICY

To ensure all service user files and confidential documentation are kept in a secure lockable cabinet in a systematic order

## PROCEDURE

- All documentation must be stored in a ring binder / wallet type folder with section dividers using the following structure:

### **Section 1 – O3B / Contact 2 / Adult Services purchasing form**

- Insert the Adult Services purchasing form.

### **Section 2 – Terms and conditions of residency**

- Insert Cumbria Care's terms of residency form
- Signed Service User Guide confirmation form

### **Section 3 – Person centred care plan**

All historical information / forms must be maintained in this section with the most recent on top. The current person centred care plan will be held on the units see P14 in the policies and procedures manual M-Z.

This section may contain the following historical documents:

- Pre-admission assessment
- Front sheet Part 1
- Dietary assessment form / MUST tool
- Story & gifts Part 2
- What's important to me Part 3
- Service user daily records
- Supervisors daily record sheet
- Review feedback sheet Part 4A
- Monthly review Part 4B
- PEEP

### **Section 4 – Medical information**

- Insert any medication information such as letters from the hospital, hospital appointments and medical card.

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x	✓	x	x	x	x	✓

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## SERVICE USER FILES

### Section 5 - Personal inventory

- Insert a copy of the service user's personal possessions inventory - see A10 Appendix 3 personal possessions inventory in the policies and procedures manual A-L.

### Section 6 – Regulation 37 notification of death, illness or other events.

- Insert a copy of the above form for any of the above incidents

### Section 7 – Accident, incident form

- Insert copies of the accident incidents forms.

### Section 8 – Correspondence

- Any correspondence to be filed in this section

### Section 9 – Confidentiality

- Any relevant documentation, which is deemed to be confidential, must be sealed in an envelope in this section.

### Section 10 – Service user daily records

- All completed records from the unit file must be filed under this section. Senior staff should archive this information as and when appropriate, but the information should be stored for the life of the service user. The archive information must be accessible if required.

### Section 11 – Supervisors daily record

- All completed records must be filed under this section. Senior staff should archive this information as and when appropriate, but the information should be stored for the life of the service user. The archive information must be accessible if required.

### Section 12 – Medication charts

- All completed medication records must be filed under this section. Senior staff should archive this information as and when appropriate,

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## S10 SERVICE USER FILES

but the information should be stored for three years. The archive information must be accessible if required.

### **Section 13 – Personal emergency evacuation procedure (PEEP) / Risk assessments / Manual handling records**

- All historical information / forms must be maintained in this section with the most recent on top.

### **Section 14 – Capacity Assessments, DOL's applications/authorisations, Best interests and decisions evidence**

- All documents must be filed under this section with the most recent at the top.

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