Build a useful continuing person record

A fillable planning workbook for five connected lessons and one practical pilot.

Use fictional Pathways participant P-24 first. Then adapt the plan to one program you own. Connect intake, attendance, participant feedback, practitioner notes and later reviews without treating these as interchangeable evidence.

Download and open this PDF in a PDF reader that supports forms. Type in the shaded boxes and save a copy. You can also print it and write by hand. Some browser viewers handle saving differently: reopen your saved copy to check your answers.

Use fictional or de-identified material for practice. This workbook does not send or store your answers on a website. Completion is a planning exercise, not certification of an implemented system.

Your participant-support question and one workflow to test

Who will help you test the plan? Record the owner and a review date.

1. Plan the collection

A collection schedule that connects a person's starting point, participation, observations and later follow-up.

Practice context: P-24 describes a transport concern at intake; attendance and later check-ins add different evidence.

Map each moment: question | contributor | source | timing | owner | access

Name shared and local fields. Which profile details can be reused, and when do they change?

Self-check: Can another practitioner explain what each source contributes and what should be collected next?

2. Review the evidence

A review record that distinguishes a source statement, observation, interpretation and next question.

Practice context: A missed session and a staff interpretation are not the same as a participant-confirmed explanation.

For two notes: source statement | interpretation | uncertainty | review | action

How will you keep participant voice separate from staff interpretation?

Self-check: Can a colleague challenge the interpretation without having to reconstruct its source?

3. Connect the history

A map of person, program episode, contributor and observation records with a visible correction history.

Practice context: P-24 participates in programs A and B; a new practitioner needs the dated history and corrections.

Map people, program relationships, dated observations and corrections.

How will missing observations and staff handoffs be represented?

Self-check: Can the next practitioner distinguish the person’s history from a particular episode and its reporting period?

4. Define progress

A small dictionary that distinguishes participation, self-report, observed practice and later outcomes.

Practice context: Two observations use different questions. A missing follow-up is not evidence of no progress.

Define the outcome, unit, observation period, method and eligible population.

Map one local field to a shared definition. What cannot be combined, and why?

Self-check: Can another colleague explain what your measures mean and what claims they do not support?

5. Govern and test

Role-based views and a pilot checklist for a continuing participant record.

Practice context: Practitioner, participant, family, partner and leadership views have different purposes.

For each role: records | allowed actions | source access | sharing | owner

Define an allowed test, a denied test and a reviewed handoff.

Self-check: Can an authorized colleague use the record while an unrelated reader remains appropriately restricted?

Test the complete workflow

Use fictional records first, then agree a small authorized pilot with the responsible people.

- [ ] A contributor can submit the intended information.
- [ ] An unrelated reader cannot access restricted records.
- [ ] A correction preserves the original and its reason.
- [ ] A reviewer can trace a finding to its source and definition.
- [ ] The appropriate reader receives useful findings and a clear next action.

Expected vs actual behavior: record gaps and the person responsible.

What will change before the next cycle? Include the next review point.