

Client records – guidance notes for visitors Details Last Updated: Saturday, 01 October

2016 14:22 Client records – guidance notes for visitors

The amount of necessary record-keeping will depend on the client's particular circumstances - their asylum case, health and other issues.

Record keeping is quite an individual thing and visitors will vary with how much they rely on memory and how much they like to commit to writing.

There is certainly no need to record details of every meeting but important information does need to be kept. Some of these key facts may be on the referral form/ rent agreement/ ASSIST application/ etc but many visitors like to make their own fact sheet for easy reference.

Please remember that all client notes are confidential.

When are client records likely to be needed

1. Visiting - as an aide memoire for follow-up and keeping track of issues and developments
2. For SWVG - regular updates for MAG or NAM, applications for ASSIST or other financial help, requests for legal assistance (eg from SWVG's legal advisor)
3. Outside SWVG - NASS applications, finding/contacting solicitor, locating client if detained, acting as advocate (eg with hospital, college, benefits), letters of support for Fresh Claims
4. At a later stage - letters of support for Permanent Leave to Remain, statements for citizenship forms, if asked to do a reference for a client

1) Personal details and contacts Keep the personal details of the client – name/mobile number/status/date of birth/ etc and, if appropriate, HO number/ solicitor's contact details/ GP's contact details/ etc.

You may also want to keep a list of people you regularly contact for the client – eg dentist, counsellor, landlord.

2) Addresses and support Record all changes of address and support, with dates. This information is essential if applying for NASS support and is sometimes needed for other purposes..

3) Legal case Record developments and keep a note of important dates eg when asylum application made, Fresh Claim sent in, NASS application made, appeal deadline, appeal hearing. Record key information and outcomes of meetings with solicitor, Home Office appointments, etc. If Leave to Remain has been granted note the date and details for renewal. Keep copies of legal documents if appropriate.

4) Health, welfare, practical help Record key facts of health, change of mood, etc. Note dates of telephone calls and letters sent on client's behalf. Keep brief notes if accompany to Job Centre, hospital, etc.

Note anything your client reports about being a victim of crime or violence while in the UK -

Southampton and Winchester Visitors Group *Working with asylum seekers and refugees*

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or even hints of possible abuse (eg domestic, racial) or exploitation. Also keep notes if your client is in any trouble with the police.

It may also be relevant to keep records about the client's children or partners.

5) Client's history In many cases it is not necessary or appropriate to ask for details of a client's past history or reasons for seeking asylum. Clients may or may not want to talk about it, particularly when they have only recently met you. However it is often helpful to have copies of asylum claims, grounds for refusal, etc.

More details might be needed if seeking legal advice (eg from a local solicitor or SWVG's legal advisor).

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