QUICK START

Start with one handover

This pack helps a shift leader turn a handover into a clear briefing with actions that are accepted and checked. Start with one shift pattern, keep the approved care record as the source of truth, and review what changed after seven days.

Your first 30 minutes

- Choose one manager or senior to lead the trial. Read the service setup sheet with them and confirm the existing recording, escalation and continuity arrangements.
- Run the 20-minute team session on page 5. Use a fictional scenario first; let each colleague practise receiving as well as giving a handover.
- Print the quick card. Choose one place in your approved system for open actions. Agree who checks overdue items at each change of shift.

What is in the download

Manager playbook: 20 pages, including 12 fictional practice scenarios with suggested answers. Editable Word workbook: eight templates, plus a print PDF. Quick card: one A4 page. README and single-service team licence.

Who this is for

Adult social care shift leaders, care home managers and supported living teams. The process prompts can be adapted to your service. References relate to adult social care in England; other settings and jurisdictions need their own policy checks.

> Act on urgent concerns when they arise. A handover is a communication point, never a reason to delay an emergency response, safeguarding action or a required escalation.

THE HANDOVER ROUTINE

Use a repeatable briefing

Use four questions in order. Keep the conversation proportionate to the people supported and the risk. A short routine is a prompt, not a fixed time limit or a substitute for a fuller clinical or safeguarding handover.

1 What needs attention now

State any current concern, action already taken, advice received and what remains unresolved. Distinguish the observed facts from what is still being checked. Use the service escalation process immediately where required.

2 What changed and what matters

Share relevant changes from the previous shift: the person’s choices, appointments, support needs, communication or agreed plans. Point colleagues to the dated entry in the approved record.

3 Who will do what by when

Give every open action a named owner, a specific due time and an approved place to record the result. Ask the owner to accept it aloud. A task assigned to “day staff” has no clear owner.

4 What did the incoming team understand

Ask the incoming lead to repeat the priorities and any uncertainty. Check that responsible colleagues can access the record and know when and how to report back. Close only once responsibility is clear.

An operational example

“The transport provider has not confirmed tomorrow’s 10:00 booking. The request is in diary entry TR-14. Casey will check by 08:30, update that entry and tell the shift lead. If it remains unconfirmed, Casey will use the transport contingency agreed by the manager.”

> The receiving colleague responds: “I own the transport check by 08:30. I will record the outcome in TR-14 and tell the lead if it is still unconfirmed.”

TEAM EXERCISES

Practice scenarios 1 and 2

Practise giving a briefing, then swap roles and read back the priority, owner and due time. Discuss the suggested response after each attempt.

01 The clinic callback

“The clinic may ring. Someone needs to chase it.” The outgoing colleague says a routine appointment query was left at 14:20; no callback is recorded.

Discuss: What is known? Who will check for a response, by when, and where will the result be recorded?

Suggested response: “The routine appointment query was logged at 14:20 in contact entry C-21. There is no confirmed response. Jordan accepts the check by 16:00 and will update C-21. If the query becomes urgent, Jordan will use the service escalation route immediately.”

> Do not invent advice or assume no callback occurred. Verify the approved record and ask the relevant colleague if needed.

02 An unconfirmed booking

Tomorrow’s transport booking appears in the diary as requested, but the confirmation field is empty. A colleague says it is “probably fine”.

Discuss: What should the incoming lead hear? What contingency has actually been agreed?

Suggested response: State that the booking is requested and unconfirmed. Name the colleague checking the provider and a due time before the journey. Refer to the diary entry and use the existing approved contingency if confirmation is unavailable.

> Keep probability separate from fact. A manager must approve a new contingency; the handover does not create one.