

Homecare training record handover checklist

Page 1 | Verify evidence and working arrangements

Use one checklist per worker per transition alongside your training matrix. Complete relevant checks; mark others N/A. Reference detailed records rather than copying every course.

For each check: D = Done A = Action required N = Not applicable.

Enter every open action in the table on page 2, with an owner and deadline.

1 Worker and transition

Transition: ☐ Starter ☐ Agency ☐ Role or branch change ☐ Returner ☐ Leaver

Worker name: _____

Staff ID: _____ Role: _____

Branch: _____ Effective date: _____

Manager: _____ Agency if applicable: _____

Training matrix or learner record reference: _____

2 Verify the profile and existing evidence

D ☐ A ☐ N ☐ Identity matched to records; existing profile checked to avoid duplicates.

D ☐ A ☐ N ☐ Intended duties and applicable training requirements confirmed.

D ☐ A ☐ N ☐ Existing evidence reviewed for relevance, level, content and completion date.

D ☐ A ☐ N ☐ Acceptance decisions, reviewer and verification date recorded in the matrix.

D ☐ A ☐ N ☐ Original completion dates preserved; gaps and unclear evidence identified.

Evidence location or secure retrieval reference: _____

Evidence reviewer: _____ Review date: _____

3 Assign learning and confirm supervision

D ☐ A ☐ N ☐ Required learning assigned to the correct profile; learner access checked.

D ☐ A ☐ N ☐ External evidence distinguished from newly assigned learning.

D ☐ A ☐ N ☐ Practical assessment and local learning requirements identified.

D ☐ A ☐ N ☐ Supervisor and task restrictions recorded and communicated to the coordinator.

Supervisor or assessor: _____ Review date: _____

Restricted duties or supervision plan reference: _____

Carry unresolved checks forward to page 2. Training assignment or a future deadline does not authorise duties for which competence has not been established.

Complete the handover

Page 2 | Transfer ownership and sign off

Worker name: _____ Staff ID: _____

D = Done A = Action required N = Not applicable

4 Transfer responsibility or reassign a learner place

☐ D ☐ A ☐ N ☐ Receiving manager accepts record ownership and outstanding actions.

☐ D ☐ A ☐ N ☐ Role, branch or agency assignment dates and requirements updated.

☐ D ☐ A ☐ N ☐ Evidence remains accessible to authorised staff after the transfer.

☐ D ☐ A ☐ N ☐ If reallocating a learner place, preserve history and use a separate profile.

Receiving manager if applicable: _____ Effective date: _____

5 Close a leaver record or ended agency assignment

☐ D ☐ A ☐ N ☐ End date recorded; access removed and future reminders stopped as required.

☐ D ☐ A ☐ N ☐ Current workforce or assignment reporting updated; history preserved.

☐ D ☐ A ☐ N ☐ Required evidence retained securely and retrievable after account closure.

Archive location and authorised role: _____

Retention policy reference: _____ Review or disposal date: _____

6 Outstanding actions

Record action IDs against unresolved checks above. Use an additional action log if needed.

ID and gap or action	Owner and deadline	Supervision or restriction	Closure date and evidence

Additional action log reference: _____

7 Manager review and acceptance

Outcome: ☐ Closed - no open actions ☐ Transferred - open actions accepted

Sign-off confirms review of the training record and acceptance of outstanding actions. It does not confirm competence or authorise unsupervised duties.

Prepared by: _____ Date: _____

Reviewed or accepted by: _____ Date: _____

Signature or electronic confirmation reference: _____

Next review date if actions remain: _____