Service Managers and Assistant Directors should sample the recording in case files at regular intervals, as detailed in the Children’s Services Policy document [Monitoring and Supervision](http://livelink.barnardos.org/livelink91/livelink.exe?func=doc.ViewDoc&nodeid=25389497&viewType=1). This sampling is recorded in File Sign Off documents that are added to the case file. This user guide details how to add a File Sign Off document to a Case File (sections 2.1.4 and 2.2.3 in the above document).

## The Process in Brief

The process for creating a File Sign Off document is very similar to that for general contact recording in a case file. The only differences are:

* The content of the document, which will relate to the result of the sampling.
* The place the document is stored, which will be the **File Sign Off** file divider in the relevant case file.
* The **Document Type** chosen in the **Categories** screen, which should be **File Sign Off**.

Apart from these specifics, the process is identical to normal contact recording, and you can use either a Text Document (as detailed in the separate user guide entitled “[Contact Recording – Adding a Text Document](http://livelink.barnardos.org.uk/livelink91/livelink.exe/Contact_Recording_%28Adding_a_Text_Document%29.pdf?func=doc.Fetch&nodeid=197219607&docTitle=Contact%20Recording%20%28Adding%20a%20Text%20Document%29)”) or a Microsoft Word document (as detailed in the separate user guide entitled “[Contact Recording – Adding a Word Document](http://livelink.barnardos.org.uk/livelink91/livelink.exe/Contact_Recording_%28Adding_a_Word_document%29.pdf?func=doc.Fetch&nodeid=197163874&docTitle=Contact%20Recording%20%28Adding%20a%20Word%20document%29)”).

The complete process for adding a File Sign Off Test Document is described below.

## Adding a File Sign Off text Document

* Open Content Server and navigate to Service User Recording and the case file that you wish to add the sign off document to.
* Open the **File Sign Off** file divider.

|  |  |
| --- | --- |
| * Choose **Text Document** from the **Add Item** drop-down list, as illustrated.
 |  |
| * Enter the name of the document in the Name field. The best naming convention to use is the one illustrated above, i.e. File Sign Off - <Your Name> - <Date>.
* Type the content of the file sign off in the main text box.
* Click on the **Add** button.
 |
|  |
| Complete the fields in the Categories screen as shown* **Document Type** – This should default to **File sign Off** for all documents added to the File Sign Offs file divider. If it does not, select **File Sign Off**.
* **Event Date** – Select the date that you sampled the file.
	+ **Worker** – Use the add category button button to the right of this field to open the list of workers and then click on the Select> link to the left of your name.
 | **Note for Assistant Directors:** If your name does not appear on the Worker list you should contact the CSM or PA for the service who can add this to the list for you. |
| * **Confidentiality** – This should default to **Standard**. If it does not, select **Standard**.
* Once you have completed the categories as shown above, click on the **Done** button.
* When the categories screen closes you will be returned to the Text Document screen. Click on the Add button again to save your File Sign Off document.
 |
| **Note:** It is important that you remember to click on the **Add** button after completing the Category information. If you just close the screen, or use the **Back** button, you will lose the document. |

