



# **Recording, Case Notes and Confidentiality**

**Last Updated: April 2026**

## **Recording, Case Notes and Confidentiality**

### **Purpose of this policy**

This policy explains how staff and mentors should record information about their work with young people and how that information must be handled safely and confidentially.

Accurate recording supports safeguarding, accountability, communication and continuity of care. It also helps MENT4 demonstrate impact, meet legal responsibilities and protect both young people and staff.

### **Why recording matters**

Recording is an essential part of professional practice. Good records help to:

- protect young people from harm
- support safeguarding decisions
- ensure continuity between staff and sessions
- provide evidence of work delivered
- track progress and outcomes
- support communication with partners where appropriate
- protect staff by providing an accurate account of events

If something is not recorded, it may be treated as if it did not happen.

### **What should be recorded**

Staff and mentors may be required to record:

- session notes or summaries
- attendance and engagement
- progress towards goals
- significant conversations or disclosures
- safeguarding concerns
- behavioural incidents
- actions taken or agreed
- communication with parents, schools or partners (where appropriate)

The level of detail required may vary depending on the programme or role.

### **Writing case notes**

Case notes should be:

- clear and easy to understand
- factual and accurate
- based on what was seen, heard or said
- written in a professional tone
- free from slang, judgement or personal opinion
- completed as soon as possible after the session or event

Staff should avoid:

- speculation or assumptions
- emotional or exaggerated language
- labelling or stigmatising language
- including unnecessary personal details
- making diagnoses or conclusions outside their role

Where possible, use the young person's own words when recording important statements or disclosures.

### **Safeguarding records**

Safeguarding information must be recorded clearly and promptly.

Staff must:

- record exactly what was said or observed
- include dates, times and locations
- avoid editing or rewriting records later
- report concerns to the Designated Safeguarding Lead immediately
- follow MENT4 safeguarding procedures

Safeguarding records are particularly sensitive and must be handled with extra care.

### **Confidentiality**

Staff may have access to sensitive personal information about young people, families, colleagues and partners.

This information must be treated as confidential.

Staff must:

- only share information on a need to know basis
- keep information secure at all times
- avoid discussing sensitive information in public or inappropriate settings
- follow data protection procedures
- respect the privacy and dignity of young people

### **Limits of confidentiality**

Confidentiality is important, but it is not absolute.

Staff must not promise to keep information secret if a young person is at risk.

Information must be shared where:

- there is a safeguarding concern
- a young person is at risk of harm
- there is a legal or professional duty to share
- it is necessary to protect someone's safety

In these situations, information should be shared with the appropriate person, such as the Designated Safeguarding Lead.

### **Storing information**

All records must be stored securely in line with MENT4 systems and processes.

This may include:

- secure digital systems
- password protected files
- approved databases or platforms
- locked storage for physical documents

Staff must not store sensitive information on personal devices or unapproved systems.

### **Sharing information**

Information should only be shared where appropriate and authorised.

This may include sharing with:

- line managers
- safeguarding leads
- relevant programme staff
- partner organisations
- external agencies where required

Information must not be shared:

- casually with colleagues
- with people who do not need to know
- outside approved systems
- on personal messaging platforms

### **Communication and confidentiality**

When communicating about young people:

- use professional and approved channels
- avoid sharing full details in group chats unless appropriate
- do not send sensitive information through unsecured platforms
- check who you are sending information to
- ensure information is accurate and necessary

### **Data protection**

All information must be handled in line with data protection requirements.

Staff must:

- only collect information that is necessary
- use information for its intended purpose
- keep information secure
- not retain information longer than required
- follow MENT4's data protection policy

### **Breaches of confidentiality**

Any breach of confidentiality must be taken seriously.

This may include:

- accidental sharing of sensitive information
- loss of records
- unauthorised access to information
- inappropriate discussion of confidential matters

Breaches must be reported immediately to a line manager or relevant lead.  
Serious breaches may result in disciplinary action.

**Final note**

Recording and confidentiality are key parts of safe and professional practice.  
Clear, accurate and secure records help protect young people, support staff and ensure MENT4 can deliver effective and accountable services.

*This document has been approved by:*

**Luke Peters**  
**Executive Director**

A handwritten signature in grey ink, appearing to be "L. Peters".

*Helping young people discover what they are MENT4*  
**Tel: 07808 595151**  
**E-mail: [luke.peters@ment4.org](mailto:luke.peters@ment4.org)**



# 1. APPENDIX A

## Safeguarding Form

All concerns should be recorded as soon as possible after the concern was raised in accordance with MENT4's Safeguarding Children and Young People Policy.

Information should be provided on this form in a factual manner. Any concerns expressed by young people should be a reflection of what was actually said; do not try and interpret any of the information. Any views, opinions or observations should be recorded clearly identifying this.

Joanna Joseph (DSL) 07443917058  
[joanna.joseph@ment4.org](mailto:joanna.joseph@ment4.org)

### BASIC INFORMATION

<b>Date:</b>		<b>Time:</b>	
<b>Location:</b>			
<b>Your full name:</b>			
<b>Your role:</b>			
<b>Name of child/young person:</b>			
<b>Age of child/young person:</b>			

### DETAILS OF CONCERN

Details of concerns/incident (do not interpret information – use the same language that was used by the child / young person). Are you reporting your own concerns or those reported from a third party?

.....

.....

.....

.....

.....

*Continue on a separate page if needed.*

**Who else has the child/young person told? E.g. who else knows of these concerns?**

.....

.....

.....

Please tick to confirm that you have reinforced MENT4's Safeguarding Children and Young people policy and procedures

**ACTIONS TAKEN**

<b>What actions have you taken, if any?</b>	
<b>To whom in MENT4 have you reported your concerns?</b>	
<b>Who and when was this information shared?</b>	<b>Date:</b> <b>Time:</b> <b>Staff or Volunteer?</b>
<b>Staff or Volunteer?</b>	

**SECTION TO BE COMPLETED BY A MENT4 SAFEGUARDING LEAD**

<b>MENT4 Safeguarding Lead name:</b>		<b>Signature:</b>	
<b>Date:</b>		<b>Time:</b>	
<b>Outcome:</b>	<b>No further action report to be filed</b>		
	<b>Internal monitoring until...</b>		
	<b>External action and escalation to...</b>		
	<b>Urgent and immediate action to be taken</b>		
<b>Referred or Signposted to:</b>			

*This form should be shredded once all relevant information is stored on to MENT4's online safeguarding reporting systems. Please make sure you follow MENT4's Data Protection Policy, Confidentiality Policy and Safeguarding Policy.*