[Insert organisation name/logo]

# CLIENT FILE ACCESS REQUEST FORM

## SECTION 1: clients to complete

|  |  |  |  |
| --- | --- | --- | --- |
| **Client name** |  | | |
| **Phone number** |  | **Date** |  |
| **Staff member name supporting the request** |  | | |
| **Staff member phone number** |  | | |

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| **Reason for access** |
|  |

|  |  |  |
| --- | --- | --- |
| **CEO/Manager authorisation** | | |
| **£ Yes £ No** | **Signature** |  |
| **Date** |  |

## SECTION 2: STAFF TO COMPLETE

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Access planning** *(for staff members to coordinate with client)* | | | | | |
| **Date of access** |  | | | | |
| **Time (from – to)** |  | | | | |
| **Client file name** |  | | **Client ID** |  | |
| **Staff member on site** |  | | | | |
| **Staff member phone number** |  | | | | |
| **Private meeting room booked** | £ Yes £ No | **Room name/number** | | |  |

|  |  |
| --- | --- |
| **After access checklist** | |
| **The file is complete** | **£ Yes £ No** |
| **The client is satisfied with the process** | **£ Yes £ No** |
| **A file note has been added indicating the date and time that the client file was accessed** | **£ Yes £ No** |
| **Client access to files request form filed in client file.** | **£ Yes £ No** |

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| **Notes** |
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| **Staff member name** |  |
| **Staff member signature** |  |
| **Date** |  |