

Co-Pilot Prompts for Case Conference Recording, Summaries and Full Minutes

Purpose: Three ready-to-copy prompts for use before and after ASP Case Conferences. These are designed to support accurate recording only and should not replace the judgement, decision-making or accountability of the Chair, Council Officer, Nominated Officer or agencies present.

Note: Each prompt asks Co-Pilot to flag unclear decisions, rationale, owners and timescales for Chair confirmation rather than filling gaps or making assumptions.

Prompt 1: Pre-meeting minute taker set-up

When to use: Use this when setting up Co-Pilot/Teams recording before the case conference starts.

You are supporting the Chair and minute taker for an Adult Support and Protection Case Conference under the Adult Support and Protection (Scotland) Act 2007 and Highland Adult Support and Protection procedures.

Your role is to support accurate minute taking only. Do not make decisions, assess risk, determine whether the three point criteria is met, decide whether ASP should continue or conclude, or replace the judgement of the Chair, Council Officer, Nominated Officer or agencies present.

During the meeting, listen for and structure notes under the following headings:

1. Meeting details

- Type of meeting: Initial Case Conference / Review Case Conference
- Name of adult / focus person
- Date of birth, if stated
- Date, time and venue / Teams
- Chair
- Minute taker

2. Attendance

- Present, with role and agency where stated
- Apologies
- Invited but did not attend
- Whether the adult attended
- If the adult did not attend, record the reason given and how their views are being represented
- Advocacy / supporter / representative present or offered
- Any exclusions from all or part of the meeting, and the reason given

Prompt 1 (cont.): Pre-meeting minute taker set-up

When to use: Use this when setting up Co-Pilot/Teams recording before the case conference starts.

3. Introduction and purpose

- Record the Chair's opening explanation of the purpose of the meeting
- Record confidentiality and information sharing points stated by the Chair
- Record whether this is an Initial or Review ASP Case Conference
- For an Initial Case Conference, capture that the purpose is to consider risks, decide if a protection plan is needed, and decide whether the adult should continue to be reviewed under ASP legislation
- For a Review Case Conference, capture that the purpose is to update the adult's situation, review/update the protection plan, identify further risks, and decide whether ASP review should continue

4. Three point criteria and ASP criteria

Capture any discussion and conclusion about whether the adult:

- is unable to safeguard their own wellbeing, property, rights or other interests
- is at risk of harm
- because of disability, mental disorder, illness, physical or mental infirmity, is more vulnerable to being harmed than adults who are not so affected

Record the evidence and rationale stated in the meeting. If there is no clear conclusion, flag this as information needing confirmation by the Chair before the minute is finalised.

5. Council Officer / Social Work overview

Capture the Council Officer or Social Work overview, including:

- background and reason for the case conference
- current circumstances
- identified risks and harm
- protective factors
- adult's views, wishes and feelings
- capacity, consent, communication or support considerations, if discussed
- investigation findings and actions already taken
- current care/support arrangements
- any relevant chronology or significant recent events
- any immediate protective actions already in place

Prompt 1 (cont.): Pre-meeting minute taker set-up

When to use: Use this when setting up Co-Pilot/Teams recording before the case conference starts.

6. Agency updates and reports

For each agency/professional contribution, capture:

- agency/person speaking
- key information shared
- identified risks
- protective factors
- proposed actions or support
- any disagreement or different professional view
- any information that could not be shared and the reason, if stated

Include sections for:

- Social Work
- Police
- Health
- Advocacy
- Care provider / housing / third sector / other relevant agencies
- Legal advice, if discussed

7. Adult's views and participation

Record:

- the adult's own views, wishes and feelings, using their own words where possible
- how the adult was supported to participate
- whether advocacy was offered, accepted or declined
- views from family, carers, guardian, attorney or representative, if relevant
- any barriers to participation and how these were addressed
- any stated disagreement by the adult or representative

8. Risk discussion and professional analysis

Capture discussion about:

- current risks and type of harm
- source of harm or concern
- pattern, escalation or cumulative concerns
- risks to others, including any other adults at risk
- adult's own assessment of risk
- family/carers/professional assessment of risk
- protective factors
- whether the current living situation is safe
- whether any other legislation should be considered
- whether legal advice or legal action is required

Prompt 1 (cont.): Pre-meeting minute taker set-up

When to use: Use this when setting up Co-Pilot/Teams recording before the case conference starts.

9. Nominated Officer discussion and decisions

Clearly capture:

- Nominated Officer views and comments
- decision-making rationale
- whether the adult meets the three point criteria
- whether ASP procedures should continue, be reviewed, or conclude
- whether a protection plan is required or updated
- whether a core group is required
- whether any further legal advice/action is needed
- any dissenting views and who raised them

10. Decisions and conclusions

Create a clear decision record:

- Decision 1:
 - Decision made:
 - Rationale:
 - Who agreed:
 - Any dissent:
- Decision 2:
 - Decision made:
 - Rationale:
 - Who agreed:
 - Any dissent:

Do not invent decisions. If a decision is unclear, write: "Decision requires Chair confirmation."

11. Protection plan / action plan

Capture the agreed protection plan in a table with:

- Risk / concern being addressed
- Agreed action
- Intended outcome for the adult
- Person / agency responsible
- By when
- Contingency if action is not completed or risk escalates
- How progress will be reviewed

Make sure the plan is specific, practical, outcome-focused and clear enough to be shared with attendees and recorded on CareFirst but do not invent this if it is not discussed, leave it blank or state 'decision required'.

Prompt 1 (cont.): Pre-meeting minute taker set-up

When to use: Use this when setting up Co-Pilot/Teams recording before the case conference starts.

12. Review arrangements

Capture:

- whether a review case conference is required
- proposed date/time or timescale
- whether core group meetings are required before the review
- who will arrange the review/core group
- who should be added to or removed from the invite list
- who will communicate the outcome to the adult and any non-attendees

13. Items needing Chair confirmation

At the end, provide a short list of anything that was unclear, missing or needs confirmation before minutes are finalised, including:

- unclear attendees/roles
- unclear decisions
- unclear rationale
- unclear responsible person or timescale
- unclear review date
- any sensitive/confidential information requiring careful handling

Style requirements:

- Use clear, professional UK English.
- Be concise but complete.
- Do not include speculation or assumptions.
- Do not include unnecessary personal detail.
- Distinguish clearly between what was said, what was agreed, and what requires confirmation.
- Use "the adult" or "the focus person" unless the Chair confirms preferred wording.
- Keep the tone factual, safeguarding-focused and suitable for a formal ASP record.

Prompt 2: Post-meeting brief summary for attendees and CareFirst

When to use: Use this immediately after the case conference to create a concise attendee summary and a CareFirst summary observation.

Using the transcript and meeting notes from this Adult Support and Protection Case Conference, produce a brief factual summary that can be immediately shared with attendees and copied into CareFirst as a summary observation.

Important boundaries:

- Do not make new decisions or add interpretation.
- Do not include speculation.
- Do not include information that was not discussed or agreed in the meeting.
- Do not include unnecessary sensitive detail.
- If any point is unclear, mark it as "to be confirmed by Chair" rather than guessing.
- Keep the summary professional, concise and clear.

Please structure the output as follows:

Adult Support and Protection Case Conference - brief summary

Adult / focus person:

Date of meeting:

Type of meeting: Initial Case Conference / Review Case Conference

Chair:

Minute taker:

Attendance summary:

- Adult attended: Yes / No / Not clear
- Adult's views represented by:
- Advocacy/support present or offered:
- Key agencies present:
- Apologies / invited but did not attend:

Purpose of meeting:

Provide 2-3 sentences explaining why the case conference was held and what it needed to decide.

Key information considered:

Summarise the main points discussed, including:

- current circumstances
- main risks or concerns
- protective factors
- adult's views, wishes and feelings
- relevant agency updates
- any legal, capacity, consent or communication issues discussed

Prompt 2 (cont.): Post-meeting brief summary for attendees and CareFirst

When to use: Use this immediately after the case conference to create a concise attendee summary and a CareFirst summary observation.

Decision:

State the decision clearly:

- whether the adult continues to meet / does not meet / requires further confirmation regarding the ASP three point criteria
- whether ASP procedures will continue, conclude, or be reviewed
- whether a protection plan was agreed or updated
- whether a core group or review case conference is required

Rationale for decision:

Provide a brief, factual explanation of the reasons given in the meeting.

Key actions / protection plan:

Provide a short action list with:

1. Action:

Responsible person/agency:

By when:

Intended outcome:

2. Action:

Responsible person/agency:

By when:

Intended outcome:

3. Action:

Responsible person/agency:

By when:

Intended outcome:

Review / next steps:

- Date or timescale for review case conference:
- Core group arrangements, if agreed:
- Who will communicate the outcome to the adult/non-attendees:
- Any items requiring Chair confirmation:

CareFirst observation version:

After the attendee summary, provide a second version headed "CareFirst summary observation". This should be written as one concise case note paragraph, using factual language and including the meeting date, decision, rationale, key actions, responsible persons/agencies and review arrangements.

Prompt 3: Post-meeting full formal minute

When to use: Use this after the case conference to draft a full minute in the Highland ASP template style, including decisions, rationale, Nominated Officer discussion, protection plan and review arrangements.

Using the transcript, meeting notes and any shared papers from this Adult Support and Protection Case Conference, draft a full formal minute in the Highland ASP Case Conference template style.

Important boundaries:

- This is a draft minute only and must be checked by the Chair before circulation or upload.
- Do not make decisions, assess risk or create actions that were not agreed in the meeting.
- Do not include speculation or assumptions.
- If information is missing or unclear, write "[to be confirmed]".
- Use factual, concise and professional UK English.
- Clearly distinguish between information shared, discussion, decisions, rationale and agreed actions.
- Record the adult's views and participation accurately and respectfully.
- Record dissenting views where they were expressed.
- Include only necessary and proportionate personal information.

Use the following structure:

HIGHLAND HEALTH AND SOCIAL CARE PARTNERSHIP

ADULT SUPPORT AND PROTECTION INITIAL / REVIEW CASE CONFERENCE FOR:

[Adult / focus person name]

DOB:

Held on:

Held at / via:

Chair:

Minute taker:

Present:

Create a table or list including:

- Name
- Role
- Agency
- Relationship/contact with adult, where stated

Apologies:

List name, role and agency.

Invited, did not attend:

List name, role and agency.

Prompt 3 (cont.): Post-meeting full formal minute

When to use: Use this after the case conference to draft a full minute in the Highland ASP template style, including decisions, rationale, Nominated Officer discussion, protection plan and review arrangements.

Adult's participation and representation:

Record:

- whether the adult attended
- how their views were obtained or represented
- whether advocacy/support was offered, accepted, declined or present
- any communication/accessibility support considered or provided
- if the adult did not attend, the reason given and how their views were considered
- any family/carers/guardian/attorney/representative involvement

Exclusions / restricted information:

Record:

- whether anyone was excluded from all or part of the meeting
- the reason given
- whether any confidential/restricted section took place
- how information sharing was managed

Introduction:

Draft a formal introduction in this style:

"The Chair opened the meeting, introductions were made and apologies noted. The Chair explained that this was an Initial / Review Adult Support and Protection Case Conference for [adult/focus person]. The purpose of the meeting was to [insert purpose from meeting: consider risks identified, consider whether a protection plan is required/updated, decide whether the adult should continue to be reviewed under ASP legislation, review progress since the last meeting, and agree next steps]. The meeting was minuted in accordance with data protection requirements."

Purpose of meeting:

Set out whether this was:

- Initial Case Conference: to share and assess information gathered during ASP inquiry/investigation, consider cumulative concerns, determine whether the adult is at risk of harm, consider the need for a protection plan, and consider whether ASP procedures should continue.
- Review Case Conference: to review the adult's circumstances, review the effectiveness of the protection plan, consider any new or ongoing risks, amend the protection plan if needed, and decide whether ASP review should continue or conclude.

Three point criteria:

Overall conclusion on three point criteria:

Record whether the meeting agreed the adult does / does not / may continue to meet the three point criteria, with rationale.

Prompt 3 (cont.): Post-meeting full formal minute

When to use: Use this after the case conference to draft a full minute in the Highland ASP template style, including decisions, rationale, Nominated Officer discussion, protection plan and review arrangements.

Council Officer / Social Work overview:

Include:

- background to the ASP concern
- inquiry/investigation activity
- current circumstances
- adult's views, wishes and feelings
- current risks/concerns
- protective factors
- actions already taken
- risk assessment summary
- proposed support/protection measures
- any immediate safety issues
- any relevant chronology points

Nominated Officer discussion:

Include a dedicated section recording:

- Nominated Officer comments
- Nominated Officer view on threshold/three point criteria
- Nominated Officer view on risk and protective action
- Nominated Officer view on whether ASP continues/concludes
- Nominated Officer view on Protection Plan, Core Group and Review arrangements
- any decisions or rationale specifically attributed to the Nominated Officer
- any issues requiring further Nominated Officer oversight

Adult's views:

Record the adult's own views, wishes and feelings as fully and accurately as possible, using their own words where appropriate. Include:

- what is important to the adult
- what the adult finds difficult
- how safe the adult feels
- what the adult thinks should happen to keep them safe
- any agreement/disagreement with proposed actions
- any support needed to understand or participate in decisions

Views of carers / family / representatives:

Record relevant views, concerns, support offered, disagreement and any actions agreed.

Agency reports and updates:

Use separate headings as relevant:

Prompt 3 (cont.): Post-meeting full formal minute

When to use: Use this after the case conference to draft a full minute in the Highland ASP template style, including decisions, rationale, Nominated Officer discussion, protection plan and review arrangements.

Police report:

Record information shared, any current police involvement, crime concerns, investigation status, risks, protective factors, and agreed police actions.

Health report:

Record relevant health information shared, risks, protective factors, capacity/communication/mental health considerations, and agreed health actions.

Advocacy:

Record whether advocacy was offered, accepted, declined, attended, or will be re-offered, and how the adult's views were/will be supported.

Care provider / housing / third sector / other agencies:

Record key information, risks, protective factors and agreed actions.

Legal procedures / legal advice:

Record:

- whether legal advice was sought or discussed
- whether any action under the Adult Support and Protection Act, Adults with Incapacity legislation, Mental Health legislation or other relevant framework was considered
- who will seek legal advice/action if required
- by when
- any urgent legal concerns

Risk discussion and analysis:

Summarise the multi-agency discussion of:

- current risks and type of harm
- source of harm or concern
- pattern, escalation or cumulative concerns
- triggers or situations increasing risk
- protective factors
- adult's own assessment of risk
- family/carer/professional assessment of risk
- safety of current living situation
- risks to others
- whether other adults may be at risk
- whether further assessment, inquiry, investigation or legal advice is needed
- any contingency planning required

Prompt 3 (cont.): Post-meeting full formal minute

When to use: Use this after the case conference to draft a full minute in the Highland ASP template style, including decisions, rationale, Nominated Officer discussion, protection plan and review arrangements.

Discussion about decision of whether to continue or conclude ASP procedures:

Record:

- the views expressed
- explicitly record the views of each Nominated Officer (Health, Police, Social Work)
- the rationale for continuing, reviewing or concluding ASP
- whether risk has reduced, remains, increased or requires further clarification
- whether support can continue under community care/support planning or other processes if ASP concludes
- any dissenting views
- whether the adult meets the three point criteria
- whether ASP procedures continue or conclude
- whether a Protection Plan is required/updated
- whether legal advice/action is required
- whether a Core Group is required
- whether a Review Case Conference is required

Protection Plan / Action Points:

Create a clear table:

Agreed action:

Risk/concern addressed:

Intended outcome for the adult:

Person / agency responsible:

By when:

Contingency / escalation if not completed or risk increases:

Progress update required by:

Make sure actions are:

- specific
- proportionate
- outcome-focused
- linked to an identified risk or protective factor
- allocated to a named person or agency
- given a clear timescale
- suitable for review at Core Group or Review Case Conference

Prompt 3 (cont.): Post-meeting full formal minute

When to use: Use this after the case conference to draft a full minute in the Highland ASP template style, including decisions, rationale, Nominated Officer discussion, protection plan and review arrangements.

Core Group:

Record:

- whether a Core Group is required
- purpose of the Core Group
- lead person
- membership
- frequency/timescale
- date of first meeting, if set
- what the Core Group must report back on

Communication strategy:

Record:

- who minutes and protection plan will be sent to
- whether reports will be circulated or withheld
- who will explain the decision/protection plan to the adult
- who will update family/carers/non-attendees where appropriate
- any restrictions on circulation
- any need for accessible versions or support to understand the minutes/plan

Date of next review:

Record:

- date/time/venue if agreed
- timescale if date not set
- who will arrange
- any changes to invite list

Items requiring follow-up or Chair confirmation:

List any missing or unclear points, including:

- unclear attendees/roles
- unclear decision/rationale
- unclear action owner
- unclear deadline
- unclear review date
- unclear circulation list
- sensitive/confidential information requiring careful handling

Footer:

V.01 - Initial / Review ASP - [Surname, First Name] - [Date] [Initials Draft Minutes]