

Customer File Checklist

Please tick once you have checked and filed the documents

- Welcome Induction Checklist (signed and dated by customer) ☐
- Customer Consent Form (signed and dated by customer) ☐
- Work Programme Agreement (signed and dated by customer) ☐
- Expenditure Checklist ☐
- Work Activity Induction (where applicable) ☐
- DWP Change of Circumstance Form ☐
- All customer appointment letters ☐
- Employment Start Declaration Form ☐
- Other correspondence/documents (please detail below) ☐
- DWP Training Allowance Forms (signed and dated by customer) ☐
- Initial Employment Plan (signed and dated by customer) ☐
- Subsequent Employment Plans (signed and dated by customer) ☐
- Initial Assessment ☐