

Protect the response seams.

Select the smallest tool that protects what could be lost: evidence, safety, ownership, acceptance, timing, outcome, authority, or the return route.

These worksheets do not create authority or replace emergency, medical, clinical, suicide-safety, legal, accessibility, reporting, privacy, record, or local procedures.

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Tool 1: Initial Report and Pre-Arrival

Owner: Receive and Prepare

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Locate

Exact place, callback, access point, responder location, and route.

Clarify and source

Exact report, who said or observed it, and how they know.

Screen

Immediate danger or medical indicators; required emergency route.

Separate

Observed, reported, inferred, decided, and unknown information.

Route and ownership

Current owner, first action, ETA, update point, and route-change trigger.

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Six-condition scan

Threat, Medical, Access, People, Pressure, Position.

Immediate protection

Emergency action, approach/hold/change/withdraw choice, and protection taken.

Pressure reduction

People, objects, noise, movement, questions, exposure, or conflict reduced.

Role organization

Condition, action, owner, next action, trigger.

Completion and return

Why the next action is safe enough; exact change that reopens Secure.

Tool 3: Decision-Ready Operating Picture

Owner: A - Assess

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Observed

Directly seen, heard, measured, or otherwise perceived by the responder.

Reported

Attributed information from the student, caller, witness, record, or partner.

Decided

Authorized decision, by whom, when, and rationale.

Inferred

Working interpretation kept separate from fact; what would test it.

Unknown and brief

Critical unknowns, priority, actions, owners, and reassessment trigger.

Tool 4: Next Safe Action and Stabilization Cycle

Owner: E - Engage and Stabilize

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Next Safe Action

One observable action the person and setting need to complete next.

Operational variables

Driver, Pressure, Function, Connection, Barrier, Support.

Change tried

Proportionate change, who performed it, and why.

Observed function

What changed in ability, participation, access, or setting - not appearance alone.

Strengthen and decide

Helpful condition preserved; movement, owner, completion test, and return trigger.

Tool 5: Response Movement

Owner: Decide What Happens Next

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Current evidence

What supports movement; what remains unknown or unresolved.

Movement

Repeat, adapt, advance, consult, escalate, or transition.

Open CARE actions

Convert unresolved conditions into explicit actions.

Control

Owner, timing, first action, student explanation, and return route.

SAFE vs. case completion

Why SAFE can or cannot step back; why the case remains open or can move.

Tool 6: Resource State and Coordination Gap

Owner: C - Coordinate Resources

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USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Capability and fit	Specific request
Required function, Decision Authority, access, eligibility, timing, and provider fit.	Requested action, urgency, information supplied, response requested.
Resource state	Gap controls
Selected, Attempted, Received, Accepted, Connected, Transferred, Completed, Verified; exception state.	Support, Time, Own, Update, Reassess, Act.
Failure response	
Maximum safe wait, contingency, reassessment, and failed-route action.	

Tool 7: Continuity and Functional Ownership

Owner: A - Assure Continuity

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Dependencies

People, shifts, settings, services, supports, records, and sequence dependencies.

Functional Ownership

Who carries each required function now.

Continuity Ownership

Who keeps the overall response connected.

Communication and Verification Ownership

Who updates whom; who verifies connection and outcome.

Decision Authority

Who may make each relevant decision; retained responsibility and repair route.

Tool 8: Closed-Loop Warm Handoff

Owner: A - Assure Continuity

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Prepare and Define

People, protection, communication access, exact function requested, and limits.

Brief

Current condition, evidence, action, response, open work, timing, and return trigger.

Sweep

Map and Assign every concurrent function, dependency, interface, and retained action.

Accept and Connect

Accepted function, declined limits, first receiving action, and operational student connection.

Verify and Release

Verify acceptance and connection; release only transferred function; retain the rest.

Tool 9: Decision-Ready Record and Communication

Owner: R - Record and Communicate

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Durable record

Chronology, attributed evidence, objective behavior/function, decisions, rationale, and correction.

Purpose-specific communication

Authorized recipient, purpose, minimum necessary content, request, and confirmation.

Change and response

What changed after action; resource and verification state.

Open work

Owners, timing, dependencies, next event, failure action, and return trigger.

Record status

Draft/final/corrected status, approved system, author, time, and access limits.

Tool 10: Follow-Up, Outcome, and Completion Decision

Owners: E - Ensure Follow-Up; Complete, Continue, or Reopen

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Expected event

What was supposed to happen, by when, and who owned it.

Connection

Whether contact/access occurred; evidence and source.

Functional and verified outcome

What the pathway produced and whether it was usable and verified.

Task, function, case

Which task ended, whether the function is complete, and what consequential work remains.

Disposition

Complete, deliberately continue, accepted transfer, or precise reopening; Decision Authority and re-entry route.

Tool 11: Local Route, Authority, and Version Matrix

Owner: Campus Implementation

USE WITHIN ROLE AND AUTHORIZED RECORD RULES

Select - Bound - Complete - Confirm - Carry. Complete only material fields from current evidence and confirm the tool cue. Return to the owning module for uncertainty, conflict, missing authority, failure, or an unmet completion condition.

Route

Function, provider/contact, hours, access steps, eligibility, expected response, and alternate.

Authority

Role permissions, Decision Authority, required consultation, and prohibited action.

Governance

Emergency, medical, suicide-safety, legal, accessibility, reporting, privacy, and record controls.

Validation

Owner who tested route, date tested, result, failure correction, and next review.

Version

Local edition/version, approved by, effective date, superseded date, and release status.

RELEASE DECISION

A local workbook remains a training draft until authorized owners validate every route, alternate, role permission, procedure reference, record destination, and review date.

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Routes and alternates

All contacts, hours, eligibility, access steps, expected responses, and failure routes tested.

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Authority

Role scope, Decision Authority, consultation requirements, and prohibited actions approved.

☐

Specialized procedures

Emergency, medical, suicide-safety, violence, accessibility, reporting, legal, and privacy controls verified.

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Records and communication

Approved record systems, disclosure rules, correction path, recipients, and minimum-necessary standard verified.

☐

Training and access

Audience, prerequisites, accessibility review, facilitator support, and field distribution plan approved.

☐

Version control

Edition number, effective date, superseded copies, review owner, next review, and withdrawal process established.

Authorized release decision / approver / date / next review: