|  |  |  |  |
| --- | --- | --- | --- |
| **Date:** |  | **File number:** |  |
| **Client’s name:** |  |
| **Students Names** |  |
| **Name of supervisor:** |  |
|  |
| **Did the client bring any supporting paperwork with them to the interview?****If yes; Have you been able to photocopy the client’s paperwork for the file?** |  |
| **If you have not been able to photocopy the paperwork, have sought permission from your supervisor prior to retaining any originals?****If you haven’t sought permission, please give your reasons as to why not.** |  |
| **Where original documents have been retained, have you issued ‘Form 5a’ to the client and retained a copy for the file?****Date form 5a was issued to the client:** |  |
|  |
| **TO BE COMPLETED IN ALL CASES WHEN ORIGINAL DOCUMENTS ARE HELD AND THE FILE IS READY FOR CLOSURE** |
| **Have you completed ‘Form 5b’ and ‘Form 5bb’ prior to returning the clients documents?** |  |
| **Date original documents returned to the client** |  |