

Challenging Calls Response and Recording Checklist

Brief staff, test local call controls and create a clear record after abusive, distressed, persistent or threatening contact.

**VERSION**

v1.1

PUBLISHED

August 2026

REVIEW

Annually or after an incident

HOW TO USE THIS TOOL

Work through the pre-shift checks with the team, keep the CALM prompt visible during calls, and complete the call record while the detail is fresh. Adapt the escalation routes to your own organisation and jurisdiction.

1**BEFORE THE CALL OR SHIFT**

- ☐ Manager, safeguarding and emergency escalation routes are confirmed.
- ☐ Staff authority to warn, transfer, pause and end calls is confirmed.
- ☐ How repeat callers and cross-channel contact are identified is confirmed.
- ☐ How recordings and sensitive notes are accessed and retained is confirmed.

NOTES AND ACTIONS**2****CALM DECISION PROMPT**

- ☐ Clarify the issue and any immediate danger.
- ☐ Acknowledge emotion or impact, without accepting abuse or promising an outcome you cannot deliver.
- ☐ Limit the behaviour: name it, state what must change, explain the consequence.
- ☐ Move to a service step, transfer, safeguarding route, call ending or emergency escalation.

NOTES AND ACTIONS

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SIGNIFICANT CALL RECORD

Date, time and channel	
Worker taking the call	
Caller details available	
Service issue	
Exact significant words	
Named people or places	
Stated timing or means	
Vulnerability or safeguarding information	
Actions taken	
People notified	
Continuing risk	
Follow-up owner	
NOTES AND ACTIONS	

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MANAGER REVIEW

☐	Immediate danger and worker support checked.
☐	Recordings or related contact preserved through the approved process.
☐	Repeat contact and patterns linked.
☐	Boundaries, staffing, information, systems and training reviewed.
☐	Actions, owners, dates and completion evidence assigned.
NOTES AND ACTIONS	

LIMITATIONS

This tool does not determine criminal offences, police action, legal liability or safeguarding thresholds. Call recording and information sharing require organisation-specific data-protection controls.

SUPPORT

Safety Solutions Training delivers practical training on managing challenging and abusive calls, built around the contact your teams actually receive. Call 02920 657753 or visit safetysolutionstraining.co.uk.

ADDITIONAL NOTES, ACTIONS AND FOLLOW-UP
