CUSTOMER RECORDS
Record System Master Sheets

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Contents of this pack

**Cover Page**
This page can be placed in the front of your record binder to enhance your professional image and match other DriverActive training materials (record sheets are ideally suited for use in a PVC folder or ring binder with plastic pockets for each set of records).

**Student index page**
Use this page to keep track of your records. This page will be the first page in your records pack. Each Master record sheet has a circle in the bottom right corner for a student number - note the name and number on the index page for easy access.

**Training Record pages**
This page is used to log course progress. It is split into the three main training phases of:

- Basic Skills - Car control
- Road Skills - Driving procedures
- Other Places - Consolidation

The second record page covers essential information for inclusion as, when, and as often as necessary throughout the course - this page includes many items that are key factors in accident causation and which should/must be addressed in some depth.

**Progress is logged at three levels**

*Introduced*
Date that the skill/concept/procedure was introduced

*With help*
Skill practised but with intervention by prompting, questions or gesture.

*Solo*
The driver can perform the skill unaided (consistently over a period of at least three lessons)

Note: Unlike the DVSA and some other record systems logging is kept to three levels. This is to avoid ambiguity and to keep the system easy to use and understand. The three levels are clear cut. Both pupil and instructor can see ‘at a glance’ the progress in relationship to test standard.

My ‘acid’ test for a good record system is ‘The Granny Test’! If your pupil’s Granny (Grandad, or anyone else) were to look at the record, they should be able to figure out how well he/she (the pupil) is progressing.

**Customer information**
This page is normally the reverse side of the ‘Training Record’ page. It is used for logging any relevant information about the pupil and keeping appointment and payment information (essential to avoid potential disputes over payments). You might get the pupil to sign (initials) for each lesson taken if they are paying in advance.

**Lesson notes**
This page is used to record the main points to be carried forward from lesson to lesson (areas for improvement). When printed ‘double-sided’, each page contains space for eight lessons. See

See record keeping notes for information about how to make your records work for business and training success - available for free download at the same location as this document.
Customer information

Name: _____________________________________________________________

Address: __________________________________________________________

Phone: _____________________________________________________________

Mobile: _____________________________________________________________

e-mail: _____________________________________________________________

Licence number: 

Theory test date: 

Practical test date: 

notes: 

appointment record

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<th>Time</th>
<th>Date</th>
<th>Paid</th>
<th>Lessons in credit</th>
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Eyesight □
Licence □
Pickup locations
### Basic Skills
- The cockpit drill & Controls
- Moving off & Stopping
- Changing gear
- Steering
- Skill development
- Emergency stops

<table>
<thead>
<tr>
<th>Basic Skills</th>
<th>Introduced</th>
<th>With help</th>
<th>Solo</th>
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### Road Skills
- Giving signals
- Hazard routine (MSM)
- Meeting vehicles
- Turning left
- Emerging
- Straight line reversing
- Turning right
- Crossroads
- Reversing to the right
- Roundabouts
- The safety bubble
- Stopping on the right

<table>
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### Other Places
- Reverse to the left
- Turn-in-the-road
- Parking in car-parks
- Parallel parking
- Overtaking
- Traffic lights
- Pedestrian safety
- Railway level crossings
- Dual-carriageways
- Road markings
- One-way systems

<table>
<thead>
<tr>
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### Show Me - Tell Me
- Tyres
- Brakes
- Fluids
- Lights & Reflectors
- Direction indicators
- Horn

<table>
<thead>
<tr>
<th>Show Me - Tell Me</th>
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<td>Horn</td>
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### Independent drives quiet
- 10 minutes
- 10 minutes
- 10 minutes
- 15 minutes

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### Independent drives busy
- 10 minutes
- 10 minutes
- 10 minutes
- 15 minutes

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<tbody>
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### Mock tests
- Passed
- 20 minutes
- 30 minutes
- 40 minutes
- 50 minutes

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<thead>
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<th>Mock tests</th>
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### Pass Plus
- Town driving
- All weather driving
- Rural roads
- Night driving
- Dual-carriageways
- Motorways

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<td>Dual-carriageways</td>
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<tr>
<td>Motorways</td>
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### Name: [ ]

### Driving test target date: [ ]

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### All Weather Driving
- Rain
- Bright sunlight
- Snow
- Wind
- Poor light conditions
- Floods
- Night driving

### Legal issues
- Alcohol / Drugs
- Accident procedure
- Vehicle ownership
- Eyesight
- Health / Prescription drugs
- Mobile Phones
- Driver’s responsibilities
- Passengers responsibilities

### Security issues
- Traveling alone
- Car parks
- Being followed
- Protecting property
- Securing your Vehicle

### Environmental issues
- Pollution
- Noise
- Vehicle disposal
- Oil / Fluid disposal
- Choice of vehicle

### Useful attitudes
- Drink Driving
- Road Rage
- Speed
- Rules and regulations

### First drive alone
- Time of day
- Route
- Duration

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**Name:**

**Driving test target date:**

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