



User Guidance

West Sussex's Early Help Family Plans

Guide for Professionals

4th Edition

April 2017



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11.	τ
12.	1 imescales
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1. Requesting Access to Holistix

1.1 Before you can access the system

If you are a new user who has not been provided login credentials to Holistix, you can request access though the dedicated Holistix Support Team, who will be able to provide you with details of what is required and subsequently, grant you access to the system.

There are three Support Teams responsible for specific geographical locations within West Sussex, and they are displayed below:

Adur/Worthing	WorthingFSN@westsussex.gcsx.gov.uk	033022 23759
	AdurFSN@westsussex.gcsx.gov.uk	
Arun/Chichester	ArunFSN@westsussex.gcsx.gov.uk	033022 23753
	ChichesterFSN@westsussex.gcsx.gov.uk	
Crawley/Horsham/Mid Sussex	CrawleyFSN@westsussex.gcsx.gov.uk	033022 23111
	HorshamFSN@westsussex.gcsx.gov.uk	
	MidSussexFSN@westsussex.gcsx.gov.uk	

Should you require further guidance with using Holistix, user training sessions take place weekly in Worthing, Bognor Regis and Horsham.

The Holistix training & support package is available through the <u>Learning & Development Gateway</u>. This includes:

- Think Family/Early Help Briefing and West Sussex Continuum of Need
- Signs of Safety and Wellbeing
- Implementing Early Help Plans
- Holistix Training
- Effective Team Around the Family (TAF)
- Early Help Direct Work Tools
- Think Family Champions Network (Holistix)
- HolistiX Q&A Drop-ins

2. Accessing Holistix

2.1 Logging on for the very first time

Once you have received your access credentials, you can proceed to the Holistix web address at https://www.qes-online.com/WestSussex/fCAF/Live, where you will be presented with the login portal, as per the picture below:

West Sussex Early Help	Conditional State
Login Usernarme: Password: Forgotten Password? Dogin	Useful Tip: By adding the address of Holistix to your browser favourites, you'll ensure that you can easily access it next time you need to log on.

After entering your credentials, a pop-up window will appear, requesting an Authentication Code*. The code is a one-time access token, generated automatically by Holistix and sent to your designated email address. You should refrain from closing the pop-up and re-attempting to log in, as by doing so, you will invalidate the Authentication Code. For a successful login, please follow the easy steps below:

*Q: Why does Holistix require an Authentication Code every time I log on?

A: As the system is entirely web-based, the authentication code is required in order to ensure that the user accessing the system is authorised to do so – this is why the authentication code is sent to their accredited email address, for confirmation.

Please note: Although we have taken many steps, including an automatic system time out after 30 minutes of idle time, it is each Holistix user's responsibility to protect the information and personal details held on the system and not share information without the full and exclusive consent of the family.

It is the system owner's recommendation that screens are not left unlocked while unattended. For the full West Sussex Early Help Acceptable Use Policy, please refer to the help pages available on Holistix.

2.2 Authentication Code (One-time access token)



Step 1: Enter your login credentials, after which a pop-up will appear, as shown in the picture below:

A new authentication code has been 'daniel.temelkov@westsussex.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.temelkov.gov.gov.temelkov.gov) A new authentication code has been sent to your email address 'daniel.temelkov@westsussex.gov.uk'.					
Authentication Code	72158754 ×					
Authenticate						

 Image: State Stat

Step 2: Access your email and open the message sent by Holistix:

Too reall
 I. S. M. S.
True Intel Back
I all series instances instances in stances and series and se

Step 3: Enter the code into the relevant field and click the 'Authenticate' button:

Step 4: After your very first login, you will be presented with Holistix 'Acceptable Use' Policy, which you must read and accept before you can use the system.

est Sussex	Early Help			Logost	
My Manager	My cases	Check for case	Start new case	My settings	Talp
ty messages					0
to pape a proof West Su stituing increasing to first th	sex Early Help-Holos Sales In Junpa	The running subject to read the	whole messings. You can only a	and messages from witten a	cases had been regipt to
	ter.	Find Delated			10
	200				
stata	(V) Up	date			
P Presid Lanson 7 (17)	o a sugar to be following	di vecisitatana casa baunti-			
-					
LS					

Step 6: You are now logged on to Holistix:

Once logged in, your home screen will display the Holistix messages inbox – This is a place that allows you to track any notifications relevant to families you're working with and any new developments that may have taken place.

	2 Simonator	Classic Wind Second
West Sussex	Early Help	Variations VEA LAS
	Ynu are required to change your password.	
	Change Password	
	New Paramet *	
	Corden Passend* •	
0-0	is adjust to the factoring acception and policy.	
Q=5		

Step 5: After accepting the Acceptable Use Policy, you are required to change your password, please ensure that your new password is one you're likely to remember.

3	3. Summary of system icons and their meaning
0	Add item – This icon allows you to add another item to the section that you are working on e.g. add child, add new address etc.
٢	Add item – This icon also allows you to add items to a section. This button will have narrative to show what you are adding e.g. Family member relationships.
	Print – This button allows you to print the document or page you are currently on. This will be useful if you want to print an assessment before you go and meet with a family to fill it out.
&	Select individual Family member – This button allows you to select case members individually e.g. when adding actions to family members. You will encounter this button a number of times throughout the system.
	Select all Family members – This button allows you to select all Family members at once.
9	Comment – This button allows you to view comments related to the section you are in e.g. comment on progress of an action.
<i>i</i>	Edit – If you click this button you will be able to edit the section it is attached to.
?	Help – This button will give you advice on the section you are on or load up the Help function available within the system.
9	Green Flag – If a child has a green flag next to them on the case summary screen then the child is not currently taking part in an assessment.
9	Blue Flag – If a child has a blue flag next to them on the case summary screen then the child has a completed Early Help Plan.
4	Red Flag – If a child has a red flag next to them on the case summary screen then the child is currently involved in an assessment and the Early Help Plan is not yet complete.
1	View Genogram – You can view a pictorial display of the Family relationships using the View Genogram button.
$\mathbf{\lambda}$	View Family Journey – You can view a snapshot of the progress the family has made through the Early Help Plan using the View Family Journey button.

4. Checking if a family has a Family Plan on Holistix

4.1 Searching for a family member

We recommend that you use the search function prior to creating a new plan, in order to ensure that the family is not already on the system, thus saving you time.

Click **'Check for case'** tab and then search for a Family member using the different information options available. If you are unsure how a name is spelt then you can search using a wildcard option which involves adding a '%' to a search term - e.g. Sm%th. Please see below:

Enter one or more search terms:

<u>Holist</u>	ix						
West Susse	ex Early H	lelp		Logged in as Daniel Ter	nelkov Log out •		Client: WestSussex Version: V0.0.144 Environment: UAT
My Messages	My cases	Check for case	Start new case	My settings	My reports	Administration	Help
Check for case	e						(?)
This screen allows you	u to check if a case	already exists for a fam	ily on West Sussex Early	Help.			
Search							Reset
Search Criteria							
family member you w Case Id Family Name Given name(s) Gender	ssex cany neip case	exists for a family mer	x		noer and either a dat	e or oirth or an approx	Tip: Y a s
Reference Numb Unique Pupil Numb CED (Central Educat Number CCM (Children's Central	ers er tion Database) ntre Manager)						perso Holi resul
Number Framework I Numb	er						on +
TFX Number							On t
NH3 Number							
National Insurance							

After clicking the **'Search'** button, the matching result will be displayed:

Vest S	ussex Early F	lelp		Logged in as Daniel	Temelkov Log out •		Client: WestSussex Version: V0.0.144 Environment: UAT
/ly Messag	es My cases	Check for case	Start new case	My settings	My reports	Administration	Help
nitial Re	open cases match your cri	iteria. Select the case ID	to view contact details	for the case coordina	tor, or to request access t	to the case.	0
nitial Re The following Case Id	sults open cases match your cri Family name A	iteria. Select the case ID Given names	to view contact details Date of birth	for the case coordina Gender	tor, or to request access t Primary address	to the case.	Closure Date
nitial Re The following Case Id	sults open cases match your cri Family name ▲ Test1	iteria. Select the case ID Given names Super	to view contact details Date of birth 23/03/2003	for the case coordina Gender Male	Primary address Select & Save, 128 Parkt 4DP	to the case. house Farm Way, POS	Closure Date Not Available

4.2 Requesting and gaining access to an existing Family Plan that is open

If the family you have searched for is on the system as shown on the previous page, you can select a family member to see their basic case information and ensure that they are the person that you were looking for.

After confirming that this is the correct person, you can select the **'Request case access'** button at the bottom of the page. A new page will come up prompting you to provide a brief reason for the access request and consequently send to the current Lead Worker of the family, as shown below:

Case Datalla		
Case Details		
Case Id	577	
Start Date	20/03/2015	
Lead Worker Details		
Lead Worker	John Riseborough	
National service list category	Additional Services	
Phone	0330 22 26972	
Email	john.riseborough@westsussex.gov.uk	
Family Member Details		
Name	Test1, Super	
Gender	Male	
Date of birth	23/03/2003	
Family Member Primary Add	dress	
Line 1	Select & Save, 128 Parkhouse Farm	
1	way	
Line 2		
Line 5		
Line 4	Havant	
Line 5	Hampshire	
Postcode	PO9 4DP	

worker will then arrange any next ste	r read norker of the case that you are interested into rease provide some background as to why you require access to this case. The rea spS.
Case Id	577
Lead Worker	John Riseborough
Subject	Accredited User is requesting access to case 577
	Case Id: 577
Reason for access	

Once you have sent the request the current Lead Worker will receive a message in Holistix asking them to accept or decline your request in the system.

*Please don't hesitate to contact the Lead Worker directly to speed up the process.

4.3 Requesting and gaining access to an existing Family plan that is closed

If the family plan you want to view is closed on the system then you will need to contact the Holistix Support Administrator for your area, as detailed on Page 4 of this guide.

4.4 Granting access to a Family Plan to other professionals

In order to grant another professional(s) access to a case you can click **'Go To Case'** in the access request message you have received, and add them via the **'Team around the family'** section on the case summary screen.

The Forward/Reply button will allow you to send a message back to the requestor within the system.

For information on the Team around the family see section **7.4**.

My Messages	My cases	Check for case	Start new case	My settings	Help
My Messages > View Messag	e				
My messages					0
Message Details					
Related to Case	167 - Jones				
From	David Hoo	David Hooper			
Sent	25/06/2014	25/06/2014 14:20:57			
Subject	David Hoo	oper is requesting access to ca	ise 167		
Message	Case Id: 16	7			
Forward/Reply Go To	o Case				

*Please ensure that your details on Holistix are complete and always kept up to date in order to enable other professionals identify you more easily and successfully get in contact with you, should they need to.

*Section 11.3 will guide you through all you need to know in order to keep your details up to date.

5. Creating a new Early Help Plan on Holistix

Once you have ensured that a family is not already on Holistix, you can create a new Family. You can start by clicking the **'Start new case'** tab at the top of your screen.

*In order to comply with Data Protection, verbal consent is required from the family to enable us to record their information on the system. You will not be able to record family details without their consent.

5.1 Recording Children's details

After selecting **'Start new case'** you have the opportunity to enter the details starting with the first Child.

Please note that you will not be able to move between screens until all mandatory information is complete. If you are trying to move onto a new page and the button isn't responding, it is likely that you have not completed all mandatory information. You can scroll up the page to find what information is missing. Missing information will be highlighted in red.

Date case created – This will automatically pre-populate to the current date.

Case name – Please use this field to enter the Surname(s) in the Family e.g. Smith or Smith/Taylor/Brown.

Child 1 details – This area allows for the entry of the child's basic details, such as names and DoB.

Date case was created	18/06/2014	
Case name *		
Start new case	- child / young person details	6
Back Next Ca	incel	Res
Child/young persor	n	
n order to create an epis	sode on West Sussex Early Help, some basic details are required. The first step covers the details of the child/young person.	
lease complete at least	the mandatory fields (those with an ") below.	
		0
Child 1	As you enter the child's details, the system will flag up any potential duplicate family members that already exist in the system. Yo click on these duplicates for more options.	ou are able to
	Details	
	Title	
	Sumame *	
	Suname * First Name(s) *	
	Sumane * First Name(s) * Known as	

Expectant mothers: If you are adding an unborn child please put the first name **as 'unborn'** and the date of birth as the estimated delivery date – you will be able to update the details at a later date, when they become available.

Family member relationships – This section becomes relevant once any further children and/or adults have been added to the Family. Please see section **5.3** on how to add a Family member relationship.

Contact details – Please enter contact details for the child. Holistix needs to verify the validity of each address, therefore you are required to search for an address using the postcode finder and selecting the correct address. You can do this by typing in the postcode field and then clicking the magnifying glass icon, this will allow you to select your address from the drop-down section on the right of the page.

Туре		
	Home 💌	
Preferred	V	
Email Address		
Comments		
Idress Details		
Address 1 🙁		C
Known Addresses	×	Select Known Address
Please enter a postcode to search	for 🔍	
Address Details		
Line 1		
Line 2		
Line 2 Line 3	-	
Line 2 Line 3 Line 4		_
Line 2 Line 3 Line 4 Line 5		_
Line 2 Line 3 Line 4 Line 5 Postcode		
Line 2 Line 3 Line 4 Line 5 Postcode Type		

4th Edition, April 2017 Author: Daniel Temelkov, West Sussex County Council, Feedback: 03302223820, Adding additional contact number or address – You can add another contact number or address by clicking

Please Note – When you add additional contact details you are required to confirm the preferred contact details for the Family using the tick box.

Further address information – You can select a Child/Adult as having no fixed address or unknown address. Please only select unknown address once you have taken all steps to find a valid current address.

Reference Numbers – Here you can add in any reference numbers you know related to the child.

At least one number has to be entered on to the system. If you don't know any of the reference numbers you can select the 'not known' tick box.

Additional information – If the Child does not speak English as a first language then you may want to describe how good their English is in the additional information box.

cuit one reference number require	nd or select not known.			
oue Rund Number		_		
ID (Central Education Database) umber				
CM (Children's Centre Manager) Uniber				
ameworki Number				
7X Number				
PS Number				
stional Insurance				
Sher				
ot known				
hnicity				
Innicity Category *	Please Select		~	
Unicity *	Please Select	~		
rigion*	Please Select	~		
other Information				
ducation *	Please Select			~
migration Status	Please Select		~	
rit Language *	Please Select	~		
ondition/Disability? *	No	~		
				~

Adding further children – There are 2 ways you can add further child(ren) to the Family. Once you have completed the information for the first child then you can click the button at the bottom of the page or you can scroll to the top of the page and click the solution is located to right at top of the Child's details page.

	Date to Case n	ne was created	23/04/2014 44
signing, interpretation or access needs	Lindays Acc In order 5 Plasse co	ung person create an episode on West mplete at least the mandato	Susses Tamily eCAV, some back details are required. The first step covers the details of the child young person by fields (those with an 17 below,
Back Next Add Child	Reset	wid As you enter these duplic	the child's details, the system will flag up any potential duplicate case members that already exist in the system. You are able to dio: or are for more options.
OES		Details Title Sumarre *	Mr v Hooper

5.2 Recording Adult's details

Once you have added all of the children in the family you can click the **'Next'** button located at the bottom of the Child's details page.

	В
	1
Additional Information	U
	ABG
Details of any special	В
requirements (for child	1
and/or their parent) e.g. signing, interpretation or	U
access needs	ABC
Next Cancel	
est Sussex Early Help is subject to the following Acceptable use policy.	

Selecting known address – There is an option to automatically select an address already linked to the family plan. You can do this by selecting the address in the known address drop-down bar and clicking 'select known address'.

23A Devonshire Road		Select Known	Address
	23A Devonshire Road	23A Devonshire Road	23A Devonshire Road

5.3 Recording relationships between family members

Once you have entered two or more family members you can record the relationships linking them. You can also select who has **Parental responsibility** for the Children.

First you will need to click 'Add Family Member' or 'Add all Family Members' tab which will now be available to you.

Adult 1	Details		
	Title	Mr	•
	Surname *	James	
	First Name(s) *	Derek	
	Known as		
	Previous surname(s)		
	Gender *	Male	
	Date of Birth (dd/mm/yyyy)	01/05/1980	12(Age: 34)
	Tick if deceased		
	Parental Responsibility		
	Family Member(s)	lanes, Joshua James Joshua James	
	Family Member Relationships) Add Family Member 📀	Add All Family Members
	① This family member has no relation	nships defined	•

You can select the relationship via the first drop-down list followed by drop-down list for the name of the Family member you are linking them to - e.g. Lucy is the parent of Chelsey and Joshua and is the Partner of Derek.

Derek	Details			
Adult 2 🙁	Title	Mrs	-	
	Surname *	James		
	First Name(s) *	Lucy		
	Known as			
	Previous surname(s)			
	Gender *	Female	•	
	Date of Birth (dd/mm/yyyy)	08/01/1981	12 (Age: 33)	
	Tick if deceased 🔲			
	Parental Responsibility			
	Family Member(s)	lanes, Joshua Jan	nes	
	Family Member Relationships	Add Family Member	Add All Family Members	
	Lucy James 👻	Parent	 Chelsey James 	 S
	Lucy James 👻	Parent	 Joshua James 	 S
	Lucy James 👻	Partner	 Derek James 	- 🙁

Once you have selected a relationship for one of the family members, this will automatically pull through to the other members you have linked them to.

Other family members also need to be linked - e.g. Lucy has been linked to Chelsey and Joshua as a Parent but Derek has not yet been linked as a parent. You can do this by selecting Derek on the screen and following the same steps.

Derek	Details		
Adult 2	8 Title	Mrs	V

5.4 Recording verbal consent

Before saving the family's information on Holistix, each practitioner is required to indicate that the family has given verbal consent for an Early Help Plan to be initiated. The two options are highlighted below:

Consent received from whole family - You will need to add the date consent was given and choose **'Yes'** in the 'consent given from family' drop-down box.

Date case mas created	28/08/2014	121	
Case name *	JAMES		
Start new case - consent a	and coordination	n	•
Back Save case Cancel			
Other required information			
Complete the section below to verify that reate a case on West Sussex Early Help if	you have gained verbal co you have not gained this	consent from the family to undertake an assessment and stor consent.	re it on HolistiX Family CAF. You must not
Lead worker details			
Name	😂 David Hooper		
National service list category	Additional Services		
	tart assessment West	t Sussex Early Help?	
Do you have verbal consent to st			
Do you have verbal consent to s Date consent given *	28/08/2014	12	
Do you have verbal consent to st Date consent given * Consent received from whole family?	28/08/2014 Yes		

Consent not received from whole Family – If consent hasn't been given for the whole family then you should provide evidence in the additional information box that the information can be stored on the system e.g. 'Father works away but mother happy for the Early Help Plan to commence'.

nd coordination
you have gained verbal consent from the family to undertake an assessment and store it on HolistiX Family CAF. You must not you have not gained this consent.
a David Hooper
Additional Services
art assessment West Sussex Early Help?
28/08/2014
No

Saving the family's information – Now you will be able to save the Case. Once saved, you will be taken automatically onto the Case Summary screen where you can add to or modify the Family.

5.5 Recording significant others

Significant others are any persons who may be closely associated with the family members and may have an impact on their day to day life, but are not going to form part of the assessment, e.g. a close family friend or a relative. You can add significant others via the **'Case Summary'** Screen by clicking the **o** in the 'Significant Others' section, located underneath the family details.

You will be taken to a new screen where you can add all personal information including all relationships of the significant other to Family members, and once ready, click **'Save'**. Significant others are connected to the case for information only.

n this section: Case Summary		My Cases > Case Summary					0
Create Message		Case Summary					U
Case Items	•	Case: 9458 - Griffin	🔅 Lead Worker:	Daniel	Temelkov - Think Fa	mily	Status: In Progress
Case Alert Settings		Concorne					1. A. 1
Case Coordination	•	Concerns					
Case Administration	•	Children					
View case snapshot		👝 Meg Griffin	👧 Stewie Griffin		👝 Chris Griffin		
Audit case events		Female, 11/06/2002 Age: 14	Male, 21/10/2013 Age: 3	9	Male, 24/07/2000 Age: 16	9	
		Adults					
		Peter Griffin Male, 01/06/1961 Age: 55	Lois Griffin Female, 08/07/1970 Age: 46	9			
		Significant Others O There are currently no sign cant	others associated with this	s case.			
		Family Address			(Multiple	e addresses exist for this family
		🏫 13 Goffs Close, , Crawley, W	est Sussex, RH11 8QB				

5.6 Family Tree/Genogram

Once you have created a family you can view the family Genogram. To do this you will need to be on the **case summary** screen, and then you will need to click the screen.

You will now be able to see the basic Genogram for the Family where you can save it as a .pdf. You can also view the full Genogram by clicking ⁵⁴.

Case Coordination	•		2 es 0 a
Case Administration	Family Address		Multiple addresses exist for this family
View case snapshot	13 Goffs Close . Crawley, V	Vest Sussex. RH11 808	0
Audit case events	Geographical Areas		
	District Name: Crawley Ward Name: Southgate Parish: Crawley LSOA: E01031598	District code: E07000226 Ward Code: E05007642 County Name: West Sussex County Code: E10000032	Easting: 526187 Northing: 136225 NHS Regional Code: E19000002 NHS Health Area Code: E18000008
	Disferr	DAlfreet	Some Cafe

6. Modifying a Family

6.1 Amending the personal details of Children or Adults

Once you have selected the Family Plan you wish to modify, you can select the Family member and this will take you to their information screen which you can now change. You will need to click **'Save'** once you have made your changes.

Create Mercane	Case Summary	
Case Items	Case: 9458 - Griffin 😻 Lead Worker: Daniel Temelkov - Think Family Status: In	Progress
Case Alert Settings		1
Case Coordination	Concerns	×.=
Case Administration	Children	
View case snapshot	👝 Meg Griffin	
Audit case events	Female, 11/06/2002 Male, 21/10/2013 Male, 24/07/2000 Age: 14 Age: 3 Age: 16	
	Aduits Pater Griffin Male, 01/05/1961 Age: 55 Significant Others There are currently no significant others associated with this case. Family Address () Multiple addresses exist	or this family
	🟠 13 Goffs Close, , Crawley, West Sussex, RH11 8QB	0
	Geographical Areas	
	District Name: Crawley District code: E07000226 Easting: \$26187 Ward Name: Southgate Ward Code: E05007642 Northing: 136225	
	Parish: Crawley County Name: West Sussex NHS Regional Code: E19000002 LSOA: E01031598 County Code: E10000032 NHS Health Area Code: E18000008	

6.2 Adding further family members

To add a new member to the Family Plan, you will need to be on the **'Case Summary'** Screen, you will then need to click the o button above the Children to add a child, or above the Adults to add an adult.

Please refer to sections 5.1 and 5.2 for more information on how to add Children and Adults to the Family.

Case Commery	Case Summary	0
Create Message		
Case Items	🖡 Case: 9458 - Griffin 🛛 🐲 Lead Worker: Daniel Temelkov - Think Family Status: In F	Progress
Case Alert Settings	Conseros	100 100
Case Coordination	•	
Case Administration	Children	
View case snapshot	neg Griffin 💦 Stewie Griffin neg Chris Griffin	
Audit case events	Female, 11/06/2002 Male, 21/10/2013 Male, 24/07/2000	
	Age: 20 Age: 40 Significant Others There are currently no significant others associated with this case.	
	Family Address ③ Multiple addresses exist for	r this family
	Family Address 💿 Multiple addresses exist for 💁 13 Golfs Close, , Crawley, West Sussex, RH11 8Q8	r this family
	Family Address Image: Control of the addresses exist for the address exist for the addresses exist for the addresses exist for the address	r this family
	Family Address Image: Construct on the second of the second	r this family

7. Recording the family needs and the Signs of Safety conversation

7.1 Starting the assessment

From the 'Case Summary screen' of the Family hover other the 'Case Coordination' tab on the navigation bar to the left then click 'Create assessment'.

			My Cases > Case Summary	n this section:
0			Case Summary	Case Summary
				Create Message
Status: Pre-Assessmen	: David Hooper	Lead Worker:	Case: 7123 - JAMES	Case Items
1			Concorne	Case Alert Settings
			Case Notes	Case Coordination
			Create assessment	View case snapshot
		👝 Joshua James	Close family	Audit case events
	<i>i</i>]	Male, 19/09/2004 Age: 9	Create consent statement	
	-,	rigers	Case documents	
			Change Lead Worker	
		Lucy James Female, 08/01/1981 Age: 33	Derek James Male, 01/05/1980 Age: 34	
			Significant Others	
			David James Male, 09/08/1950 A ray 64	

At this point you can pick who will be part of the assessment by putting a tick by their name (if you do not tick the whole family, you can bring them in once the assessment has started).

Once the family members to be included in the assessment are selected, click 'Create Assessment'.



7.2 Consent statement

Before you can complete the assessment, you have to obtain the Family's agreement to the information being recorded and their consent to sharing their plan with other organisations/services that may be able to provide support as part of the Early Help Plan.

The consent form (along with the whole assessment) can be printed from Holistix by clicking the printer icon. This form must be signed by an appropriate member(s) of the family. The signed form should be scanned and uploaded onto the case record (see section 7.6.1); following which it should be **destroyed**. (Note: if you do not have scanning facilities, you can contact the Holistix Support Team who will be able to do this for you.)

Once you have gained the family's written consent and completed an assessment you can record it on the system.

Select the date the consent was granted, followed by who granted the consent.

	Novt
Consent 1	
shared confidentially with our named pa Years, Education, Health, Housing, Leisur signing into this programme you are agr	upport you and you namy by providing the best possible aerices of appoint in the to do dials you monator will be there so that a comprehensive picture can be built through a multi-agency shorte. Our partner agencies include WSCC Early e. Police. Probation, Social Care, Youth Services, Worth Services and the Department for Communities & Local Government. By eeing to the sharing of your information with these agencies involved and any other professional services that are highlighted with the source of t
as being able to assist you All information	In will be stored securely and dealt with in a contridential and protessional manner. Your information will not be disclosed
as being able to assist you. All informatio outside of this program unless there are	in will be stored securely and deart with in a confidential and professional manner. Your information will not be disclosed any concerns about the safety or the wellbeing of a child, young person or an adult.
as being able to assist you. All informatio outside of this program unless there are We are committed to working together v	In will be stored securely and deart with in a continential and professional manner. Your information will not be disclosed any concerns about the safety or the wellbeing of a child, young person or an adult. with other service providers and professionals so that services provided to you best serve your needs.
as being able to assist you. All informatic outside of this program unless there are We are committed to working together v	In will be stored securely and deart with in a contidential and professional manner. Four information will not be disclosed any concerns about the safety or the wellbeing of a child, young person or an adult.

Services/Practitioners to be invited to the TAF – This is a free text box for the family to confirm who they would like invited.

ervices/practitioners to k	e invited to the TAF	
		В
		10
		U
		ABIC

Once you have completed this step, you can move on to the **'Family'** section of the assessment by clicking **'Next'**.

Save as draft Delete draft assessment	Next
	F

7.3 Family details

The majority of the information on the **'Family'** tab of the assessment is automatically pulled through from the Family Member(s) details. You will need to fill out the first section with details of the current family and home situation.

You can edit a Family member's details using the links available on the page.

Start Date of Assessment (dd/mm/yyyy) *	12	
Details of current family and home situ	ation	
lease provide in the box below, through illustrati	on and/or narrative, details of the family structure including parents/care	rs, child or other significant adults who live or
lo not live in the family home.		
		в
		10
		<u>U</u>
Practitioner*		
The following details are read only click here to o	ed in information.	
		0
Pol-		
Details		

If at this stage you have identified Family members that have not yet been added to the assessment you can do this by clicking

A pop up box will appear where you can select or de-select family members as necessary.

① The following de	etails are read only, <mark>click here</mark> to edit adul	It information.	
Barry	Details		
Jayne	Title	Mr	
	Surname *	Hooper	

7.4 Team around the family (TAF)

You can add Practitioners to the TAF once the consent has been gained. You can do this by clicking olicated to the right of the 'Practitioners' section.

7.4.1 Adding existing system users to the TAF

In order to add an existing user you can click the **'Search'** button where you will be able to search using First Name, Surname, National Service Category or Local Service. To search all users of the system leave the search options blank and click **'Search'**.

s	Global User Search	1	
	You must search Holis	tix for existing users to add them to this case.	
Find User			8
Enter none or mor	e fields to search, the :	search system will restrict results by all of the attributes provided.	
First name			
Surname			
National Service	Category	•	
Local Service			
Search			

Once you have selected the Practitioner you wish to add to the TAF it will take you back to the previous screen and pre-populate the details. Now you can select the Family members they are working with, followed by start and end dates and comments (if applicable). Then click **'Save'**.

Associated with								
Family Member(s)	🔍 😂 🍰 Chelsey James, Jo	🔍 😂 🍰 Chelsey James, Joshua James, Derek James, Lucy James						
Episode TAF involvements								
Start Date	01/09/2014	12						
End Date		12						
Comments		* *						
Save Clear Potura to A	rormont							

If the user has the correct alert set up on their user settings (see 11.2) then they will receive a message in the system to confirm they have been added to the TAF.

7.4.2 Adding non-system users to the TAF

To add a Practitioner that is not on the system then you will need to select **'non-system user'** from the drop-down box on the **'add practitioner'** screen and then enter the details manually and click **'Save'**. You will not be able to send any information to these users via Holistix and this will need to be done externally.

Type	System User	-
* F	System User	
	Non System User	
ou must search Holistiv for evi	ting users to add them to this case.	
	sung users to add them to this case.	
Search		
User Details		
Title		~

7.4.3 Adding TAF members outside of consent

The system will allow you to add someone to the TAF even if the Family have not given consent. You do this using a **'Consent Override Decision'**. This would only be used in exceptional circumstances, e.g. if you need to give access to a Social Worker because of child protection reasons.

Practitioner not in consent	8
You are adding a practitioner to the team around the case member (TAC) of David Hooper and Barry H Jayne Hooper from a service which does not have consent to view this case. To add this practitioner ye either:	ooper and ou must
 Re-do the consent statement for the case members to include this practitioner's national servic Complete a consent override decision (COD) form. If you do complete a COD it must be able to in the public interest. CODs are both fully audited and reported on. 	e list category be justified as
Re-do Consent Statement Consent override decision	

When you put in the details of the practitioner and save, the system will give you a message telling you that you have tried to add someone outside of consent. Click **'Consent override decision'** followed by the reasons for the decision and the date when access to the Family's information will end, and click **'Save'**.

Consent Override Decision		3
Consent Override Decision Deta	ls	
Reason for information sharing outside of consent		
End Date	12	
Reason for additional access		
Save		

7.4.4 Services involved with the family members

You can add services that are currently working with the Family by clicking $\begin{tabular}{|c|c|c|c|c|} \hline \end{tabular}$

You will be taken to another screen where you will need to add the information on the Service. The mandatory information required are the National Service, Local Service and Case Members involved with the service.

🤌 Family	Family Members						
🔊 Sam	Name 🛦				Туре		
🥪 Jam	Sam Smith				Child		
Simon	Simon Smith				Adult		
	Practitioners 🔘					Include Past	Practitioners?
	Name 🛦			Role		Start Date	End Date
	🖌 David Hooper			Lead	Professional	23/04/2014	N/A
	🖋 Main Frame			Pract	titioner	15/05/2014	N/A
Services	with the family 🔇 Add Service						
Case Member(s)		Ongoing?	Service		Practition	ner	
Sam Smith, Simon	Smith	Yes	AAA Secure Unit				Ø
Comments							B U Mag

7.5 Identification of Needs

This section allows the professional completing the assessment to identify the specific needs of the Family. The system will then record their needs. Please note that, should you discover further underlying needs, not noted in the initial form, you will be able to create a new one at any time during intervention through the navigation bar on your **'Case Summary'**.

Statement of Necch Conversation Back Save as draft Delete draft assessment Identification of Needs Identification of Needs This section should be used to identify the current needu/worries of the family. These may change during the indicator 1 - Crime and Anti-social Behaviour This family includes Owned Owned <t< th=""><th>The ID of Needs tool is a useful way of recording the needs of the family members across various themes – very useful in providing the completing practitioner with a clear understanding of complexity/services to be involved and will also underline the overarching outcomes that need to be set out(e.g. if unauthorised absence is identified as a need, one of the outcomes of the plan</th></t<>	The ID of Needs tool is a useful way of recording the needs of the family members across various themes – very useful in providing the completing practitioner with a clear understanding of complexity/services to be involved and will also underline the overarching outcomes that need to be set out(e.g. if unauthorised absence is identified as a need, one of the outcomes of the plan
Image: Adult offenders who have parenting responsibilities. Image: Ima	will be to reduce the absence)
This family includes O Children who have 15% or more absence for 3 consecutive terms.	

Once you have completed the Identification of needs by selecting the appropriate number of Family members affected by each indicator, you can move on to the **'Signs of Safety Conversation'** section of the assessment by clicking **'Next'**.

7.6 Signs of Safety Conversation

In this tab, you can provide information around the Family, elaborating on worries and needs, add desired outcomes, and actions needed to achieve them, as well as record any potential health or safety risks to other professionals visiting the Family and also upload key documents.

7.6.1 Uploading documents

To upload a document you will first need to give it a title, then press the **'Browse'** button and locate the file you wish to upload on your computer. Once located, you can upload the file.

Consent Family TAF Statement	Members Identification Signs of Safety of Needs Conversation	
Back Save as draft Delete	draft assessment	ave as final
Assessment Information		
Meeting Date (dd/mm/yyyy) *	12	
Lead Worker	Training User1	
Are there any other assessment	s being used to inform this plan?	
Upload Document		
Title *		
Notes		
Document	Browse Upload	
What's going well?		
Enter details of what is currently going w	ell.	
Olivia Orange, Oscar Orange, Florence O	range 💩 🍰	

7.6.2 Adding immediate next steps

Once you have provided information about the Family you will need to add at least one action (or next step). These are immediate next steps to support the Family and prepare for the first Team Around the Family (TAF) meeting and are **not part of the action plan**, e.g. 'Speak to School'.

Family Member(s)	and the set of the set	
Who will do this?	a ab David Hooper	
Outcome(s)	School represented at TAF meeting	*
		-
Actions(s)	Call School and invite them to the TAF meeting Speak to School Teacher and share information	^
		-
When should this be done by?	12/09/2014 12	
Status	Open 💌	
ction Progress and Commen	ts 🕥 Add Comment	
This action door not have any		
I his action does not have any	comments.	

7.6.3 Identifying Risks to other Professionals

This is where you will be asked to note any concerns associated with working with the Family e.g. violent partner, aggressive family dog etc. If there are **no concerns**, you are advised to note that none were identified. You will not be able to save the final assessment without completing the 'Working Safely' section.

Concerns can be edited by clicking 🐲

7.7 Distance Travelled Tool

As part of the Assessment, we are asked to complete the Distance Travelled Tool, which will give us an accurate reflection of the current level of worry across different aspects of the family's life. The tool contains 37 questions, split across the 6 areas of need. We can visit and mark all questions that are relevant to the family and note the level of the worry, while leaving areas that are irrelevant, or there are no worries, blank.

Consent Family TAF Members Identification Signs of Statement	Safety ation	Distance Travelled				
Assessment is final and cannot be amended.						
Back						=
						Not an issue
		1	4	7	10	√
Education - 'Be able to learn and be ready for school and work'						
1. Are there any worries about parents / carers engagement in their child's education?	0	•	•	۲	•	0
2. Are there any worries about children's engagement in learning?	?	•	•	0	۲	0
3. Are there any worries about children's school attendance?	0		•	۲	•	0
4. Are there any worries about the children's behaviour in school?	?		•	0	۲	0
5. Are there any worries about bullying (children & young people)?	0		•	۲	•	0
Family Life - 'Families receive the support they need early'						
6. Are there any worries about relationships between family members/issues with secure attachments?	?	•	•	0	۲	0
7. Are there any worries about caring responsibilities impacting	0			۲		

Please note: You must mark areas as 'Working Well' <u>only</u> where there was previously a worry, which has now been resolved. Do <u>not</u> complete questions that have <u>not</u> been of a worry as 'Working Well', as this will invalidate the calculation carried out by the tool.

7.8 Finalising the Assessment

Once you have completed your assessment you will be able to save your assessment as a final version. Please note that once you do this you will not be able to edit this document and it will become a **'read only'** document.

& Action	Who	Last Modified	Modified By
rrange Save Asso	essment as Fi	nal	e
Are you sure and become	you want to finalise read only.	e the assessment? It w	ill lock for editing
Are you sure and become	you want to finalise read only.	e the assessment? It w	ill lock for editing

7.9 Wider Assessment

If you feel that there are further factors and areas of need that the 'Simple Assessment' could not fully cover and you would like to elaborate further on specific aspects of the family life, you can consider starting a standalone Wider Assessment for the family – the option to do so will now be available within your 'Case Coordination' menu.

Case Coordination	•	Create wider assessment
Case Administration	•	Create delivery plan and review
View case snapshot		Close family
Audit case events		Create consent statement
		Request service provision
		Create Distance Travelled
		Create Identification of Needs Form
		Change Lead Worker
		Create CSE Record

HolistiX will open a new Wider Assessment, allowing you to elaborate on aspects of the current family and home life including, neighbourhood, community, health needs as well as capturing the family members' views on the current situation.

Case: 9458 - Griffin	Date: 06/12/2016	12	Practitioner:	Please Select		~
W-Assessment Part 1 Part 2						
Save as draft Delete draft assessment]				≞	Next
Family & Community Life and Relations	nips					
How do family members get on with one another?						
						R
						10
						U
						ABC
What support is offered from extended family, frien	ds and neighbours?					
						R

8. Creating a Delivery Plan & Review (DPR)

8.1 Starting a DPR

Once you have organised the TAF review meeting you can input the information & outcome from it on the system. To do this you will need to start a '**delivery plan and review**' which is available on the Case Summary screen. Once on the Case Summary Screen you will need to select **'Case Coordination'** tab and then **'Create delivery plan and review'**.

In this section:	My Cases > Case Summary		
Case Summary	Case Summary		2
Create Message			
Case Items	Case: 7123 - JAMES	Lead Worker: David Hooper	Status: In Progress
Case Alert Settings	Conserves		1
Case Coordination	Case Notes		
View case snapshot	Create delivery plan and review		
Audit case events	Close family	👝 Joshua James	
	Create consent statement	Male, 19/09/2005	
	Request service provision	Age of the second	
	Create think family review		
	Create Distance Travelled	Lucy James	
	Create Identification of Needs Form	Female, 08/01/1982	
	Case documents	nye se	
	Change Lead Worker		

You can then, similarly to the assessment, select and de-select individual family members to include in the Delivery Plan & Review.

In this section: Case Summary	Create Delivery Plan & Review
Create Message	Creating a Delivery Plan & Review will lock this case for other TAF members until it is finalised. This means they will only have read-
Case Items	 only access to the case until that happens.
Case Alert Settings	You will also need to select which family members this Delivery Plan & Review should be applied against from the list below.
Case Coordination	
View case snapshot	Case Children
Audit case events	Chelsey James
	🔽 Joshua James
	Case Adults
	☑ Derek James
	✓ Lucy James
	Create Delivery Plan & Review

8.2 Planning and Review

8.2.1 Meeting attendees

Here you can log who attended the review, who has sent in a report prior to the meeting and who sent their apologies.

Practitioner Name	Role	Attended Review	Received Report	Did Not Attend
Training User1	Trainee	۲	0	0
Training User2	Trainee	۲	0	0
Family Member Name		Attended Review	Received Report	Did Not Attend
Florence Orange		۲	0	0
		0	0	0
Oscar Orange		۲	0	0

8.2.2 Desired Outcomes

The first outcomes box is pulled through from the latest Signs of Safety Conversation and is not modifiable.

They are repeated further down the page and this is where the outcomes can be modified.

The rest of the fields are consistent with the assessment fields, and based on the Universal Signs of Safety approach.

These outcomes have been pulled through from the latest assessment. You can modify	/add to them in this review.
Test - Desired outcomes	
What is working well?	
	B ;≡ ⊻
What are people worried about?	
	B i≡ ⊻
What are people worried will happen if nothing changes?	
	B

If it is decided at the TAF meeting that a Wider Assessment is required, even if this wasn't identified at the Assessment stage, you can tick the box entitled **'Is a wider assessment needed?'** This will record the TAF's decision for a Wider Assessment to be completed.

Following wider assessment option wi	Il enforce the next assessment created to be a wider assessment.
Is a wider assessment needed?	

8.2.3 Adding new actions following a TAF Meeting

All actions included in the assessment are available to view and edit at the bottom of the page. You can also add any new actions that have come out of the review.

Note: Before you close an action please add a new comment stating whether the outcome was or was not achieved

8.2.4 Allocating expenses to an action

There is also the opportunity to add in the cost associated to an action e.g. mum attends a parenting class which costs £25.

Note: This is only required if there is a family budget and is for information and reporting purposes only.

Case Hier Settings	Action Details		
Case Coordination	Family Member(s)	a a chris Griffin	
Case Administration	Who will do this?	aniel Temelkov	
View case snapshot	Outcome(s)		20
Audit case events		Outcome	В
			10
			U
			-49
	Actions(s)	Action	5.0 12.9 13
	Actions(s)	Action	5 # 8 8
	Actions(s)	Action	5.8 ∦ 8 2 Ⅲ ⊻
	Actions(s)	Action	8 8 11 12
	Actions(s)	Action	8.8 B U U
	Actions(s)	Action	8.8 8 ::= ⊻ *>
	Actions(s)	Action	5 € 8 8 8 10 9 10 10 10 10 10 10 10 10 10 10 10 10 10 1
	Actions(s)	Action	8 12 12 12 12 12 12 12 12 12 12 12 12 12
	Actions(s)	Action	8 := 12 **

8.2.5 Scaling tools

Impact on well-being of children

This scale is intended to measure how the current situation is affecting the child's day to day life on a scale of 0-10 e.g. lack of school attendance is impacting their learning. (0 = serious worries and 10 = no worries).

Impact on well-being of child $\label{eq:started} \fboxline 0 \ \oslash \ 1 \ \oslash \ 2 \ \oslash \ 3 \ \oslash \ 4 \ \oslash \ 5 \ \oslash \ 6 \ \oslash \ 7 \ \oslash \ 8 \ \oslash \ 9 \ \oslash \ 10$

Parents' confidence to create & maintain change

Parents' confidence to create & maintain change

This scale measures the confidence of the parents and their ability to make the changes they have identified and or maintain the changes they have already achieved. (0= Serious worries 10= no worries).

8.2.6 Voice of the Family

In this section you can record each individual Family member's view of the process and the outcome of the review.

You will have the opportunity to add a brief summary of the progress made and the main worries you still have with the Family and their ability to make/maintain change.



8.3 Distance Travelled Tool

For the completion of the Distance Travelled Tool, please refer to Section 7.7.

NB: The questions scaled as part of the Distance Travelled Tool that we completed while filling in the Simple assessment will be, at this point carried over to our new tool, enabling us to consistently answer the same questions.

Please see <u>Appendix A</u> for a printable version of the tool, and <u>Appendix B</u> for further guidance.

8.4 Revision of Identification of Needs

If any of the needs of the Family have changed you can update the Identification of Needs section. You can either create a blank form to fill out a new checklist, or you can copy through and edit the latest finalised version to see what has been previously entered. All needs that we have previously identified will be included in brackets to the right.

Please refer to section 7.5 for further information on the Identification of Needs.

8.5 Revision of Consent

There will already be a Consent Statement in existence, so only add a new consent statement if information has changed e.g. Family no longer want their information shared with Police. If you add a new consent statement, then the previous one will no longer be valid and will be replaced.

If you have started a new consent form and need to cancel the form then you will need to click the **a** button.

8.6 Finalising the DPR

Once you have completed the plan you can save it as a 'final'. Please note that once you do this you will not be able to edit this document and it will become a **'read only'** document. You can however, initiate a new DPR at any time through the **'Case Coordination'** option within the **'Case Summary'**.

8.7 Family Journey

After recording the first Delivery Plan & Review, HolistiX would contain enough information to give you a visual representation of the family's journey so far.

In order to access this, you can select the button, located at the top right of the Case Summary. HolistiX will display a graph, highlighting the average scores of previous Distance Travelled Tools and the dates they were completed on.



Underneath, it will also provide detailed information on the progress the Plan has achieved in the different areas of worry and also highlight any worries that have increased.

Distance Travelled Scores

	26-Oct-16	20-Nov- 16	23-Nov- 16	24-Nov- 16	24-Nov- 16	24-Nov- 16	24-Nov- 16	24-Nov- 16	Overall Change
Education - 'Be able to learn and be ready for school and work'									
1. Are there any worries about parents / carers engagement in their child's education?		1	1	1	4	4	4	7	⊙ +6
2. Are there any worries about children's engagement in learning?		4	1	4	7	1	7	10	⊙ +9
3. Are there any worries about children's school attendance?	4	1	1	1	4	4	4	7	○ +6
4. Are there any worries about the children's behaviour in school?		4	1	4	7	7	7	10	⊙ +9
5. Are there any worries about bullying (children & young people)?		1	1	1	4	1	4	7	⊙ +6
Family Life - 'Families receive the support they need early'									
6. Are there any worries about relationships between family members/issues with secure attachments?		4	1	4	7	7	7	10	Q +9
7. Are there any worries about caring responsibilities impacting negatively on children within the family?		1	1	1	4	4	4	7	O +6
8. Are there any worries about boundary setting and discipline?		4	1	4	7	7	7	10	• +9

9. Case Coordination

9.1 Case Notes

Create Message		-								_
Case Items	•							0	rooto o coro n	oto
Case Alert Settings		0	Search Filter	s				0	reate a case in	ote
Case Coordination	•							0		
Case Administration	•		Date V	Time	Category	Description	Date Created	0	Author	
View case snapshot			14/11/2016	08:17	Letter	Letter received from Housing Assiociation. Copy attached to the note.	15/11/2016 14:20:53	0	Daniel Temelkov	-
Audit case events			02/11/2016	00:00	Email	Email from Stewie's nursery asking to be added to the plan.	15/11/2016 14:23:20		Daniel Temelkov	
			02/10/2016	00:00	Face to Face	Home visit rescheduled for 12/11 due to Lois' work commitments.	15/11/2016 14:22:06		Daniel Temelkov	4
				1				-	Page Size 10	~

You and the rest of the professionals supporting the plan can log any key information or contacts on the system via the **'Case notes'** section. This can be accessed by clicking **'Case Items'** followed by **'Case Notes'** on the right hand side of the screen.

You can upload a document to support the Case Note. All uploaded documents have their own folder in the Case Documents screen which can be accessed by clicking **'Case Items'** followed by **'Case Documents'**

After having created a Case Note, you can also **edit** this note if necessary by clicking the solution.

To **print** a Case Note (s) you will need to select the case notes you want using the tick box selection (where you can select more than one) and clicking the 📥 button.

You can **search** for a Case Note by clicking the 'search filters' button and searching by category, description, date or author.

9.2 Actions

You can view, add and update any actions by clicking **'Case Items'** followed by **'Action List'**. Any actions due in the next 5 days will appear in red.

i p	age lists all of t nd review sessi	he actions related to th ons.	is case. Practitione	ers can upd	late open actio	ns which are assig	ined to them be	tween	del
	o in their first way	included in even deli-	and an inclusion	. Desthic	and a stimulation	will be used used.	W s deliver relation		
ig	drafted by the	lead worker.	ery plan and revie	w. Per tris	reason actions	will be read-only	in a derivery plan	anu	eva
	Printer .	Transmission and the second			Last			Caron	
1	ramiy	Action	Outcome	Who	Modified A	Modified By	When	State	IS
	Derek	Call School and	School	David	01/00/2014	Decid Hannes	12/00/2014	0	
	Lucy	invite them to	TAF meeting	Hooper	01/09/2014	David Hooper	12/09/2014	Oper	
	Chelsey	<< (1) << Prev	1 Next >>				Page Size	10	٠
	Inches								-
	Joshua								
	David								

To update an Action, click the Action itself.

Note: Before you close an Action please add a new comment stating whether the outcome was or was not achieved

9.3 Case Documents

Case Documents section can be accessed by clicking **'Case Items'** followed by **'Case Documents'** from the menu on the left hand side on your **'Case Summary'**.

The documents will be filed into folders, and you can create new folders, should you need to at any time.

Vest Suss	ex Early	Help		Logged in as Daniel Te	emelkov Log out •		Client: WestSussex Version: V0.0.145 Environment: UAT
My Messages	My cases	Check for case	Start new case	My settings	My reports	Administration	Help
In this section: Case Summary		My Cases > Case Summ	ary > Case Docume	nts			
Create Message		case o scament					
Case Items	•	Upload new docum	nent 🛛 🔂 Add Ne	w Folder			
Case Alert Setting	i i	A B Root		🕌 root			19
Case Coordination	•	🌡 Case Note 🛙	Documents	No documents found to	match your search or	itaria	
Case Administratio	n 🕨	Correspond	ence	No occuments round to	match your search of	nerna,	
View case snapsho	t	Health					
Audit case events		Social Care					

9.4 CSE Records

You can create Child Sexual Exploitation Records at any time during the life of the plan. To do so, select the 'Create CSE Record' option from within the 'Case Coordination' menu. You can select the family member the record relates to, the score (High, Medium, Low), according to the LSCB risk assessment and the start and end date. You can then upload a copy of the completed risk assessment to the Case Documents.

West Sus	sex Early	Help		Logged in as I	Daniel Temelkov	Client: WestSussex Version: V0.0.170 Environment: UAT		
Ny Messages	My cases	My team's cases	Check for case	Start new case	My settings	My reports	Administration	Help
In this section:	•	My Cases > Ca	ase Summary > Crea	ite CMR				
Case Summary		Create CS	F Record					2
Create Message		create es	Enceord					
Case Items	•	Case Membe	er (*	🐣 Meg Gr	iffin			
Case Alert Settin	ngs	Score *	Score *		ct			
Case Coordination	on 🕨	Start Date *		06/12/2010	5			
Case Administra	tion 🕨	End Date	End Date			12		
View case snaps	hot	Action			P			
Audit case even	ts	Action						

9.5 Safety Concerns

You can create Safety Concern Records at any time during the life of the plan. To do so, select the 'Create Safety Concern' option from within the 'Case Coordination' menu. You can select the family member the record relates to and provide details of the concern.

Case Summary	Create Concern Red	cord
Create Message		
Case Items	Case Member *	la 💩 a Chris Griffin, Lois Griffin, Meg Griffin,
Case Alert Settings		Peter Griffin, Stewie Griffin
Case Coordination	Concern *	Required
Case Administration	•	B
View case snapshot		т
Audit case events		**
	Start Date *	06/12/2016 12
	End Date	12

9.6 Creating a stand-alone Distance Travelled Tool (DTT)

A new DTT can be created at any time, should the level of worry change suddenly, or a significant event has a sudden impact on the Family wellbeing.

As usual this can be initiated via the **'Case Coordination'** menu on the left hand side of the **'Case Summary'** screen and selecting the **'Create Distance Travelled'** option.

Once opened, you can refer to item 7.7 for details on completing the tool.

9.7 Creating a standalone Identification of Needs form

If the needs of the Family change outside of the latest assessment and Delivery Plan and Review, then you update the Identification of Needs section by clicking **'Case Coordination'** tab on the left side of the screen, followed by **'Create Identification of Needs form'**. For information on the Identification of Needs form see section 7.5 of the user guide.

9.8 Adding/Removing other Professionals from the Team Around the Family (TAF)

You can add/remove members from the TAF at any point. To do this you will need to be on the case summary screen and in the **'Case Items'** section click **'Team around the family'**.

For more information on how to add members to the TAF then see section 7.4.

n this section: Case Summary	My Cases > Case Su	mmary > Team Around The Family			G
Create Message	Team around	a the family			
Case Items	This page lists all of	the people who are or have been involved	with supporting family members v	within this case.	
Case Alert Settings					
Case Coordination	Family	Family Members			
View case snapshot		Name 🛦	Туре		
Audit case events	arry Barry	Barry Morton	Adult		
	🐉 Jennifer	Jennifer Morton	Adult		
	Lucy	Lucy Morton	Child		
	C Timethu	Timothy Morton	Significant Other		
	Innotity	Practitioners 🕥		Include Past	Practitioners? 🥅
		Name 🛦	Role	Start Date	End Date
		Aaron Aardvark	Practitioner	18/06/2014	N/A
		🥩 David Hooper	Lead Worker	18/06/2014	N/A
		🛹 Mel Benham	Practitioner	18/06/2014	N/A

9.9 Changing the Lead Professional

After the TAF meeting it may have been decided that another member of the TAF is better suited to be the Lead Worker. To do this on the system you will need to select the **'Case Coordination'** tab followed by **'Change Lead Worker'.**

Choose a new Practitioner from the drop-down list (these are taken from the TAF list) followed by the reason for the change and click **save**.

this section: Case Summary	My Cases > Case Summary > C	nange Case Coordinator	
Create Message			
Case Items	Change Lead	Worker	
Case Alert Settings			
Case Coordination	Use this screen to c	nange the lead worker for the case.	The lead worker must be
/iew case snapshot	first set as a membe	r of the team around the family.	
udit case events		,	
	Select a new lea	d worker	
	Practitioner *		
	Effective Date	19/06/2014	
	Reason *		В
			==
			:= <u>U</u>

Please note: Once you change the Lead Worker, you will no longer have the ability to add or modify the Early Help Plan and will have read-only access.

9.10 Closing the Early Help Plan

Note: Please ensure that all goals you have set out within the Plan have been achieved, prior to closing it. Should the family still be receiving support from other professionals, it is recommended that instead of closing the Plan, the Lead Worker is changed to the professional currently supporting the Family or individuals.

You can close the Plan either during Delivery Plan and Review (see section 7.2.8) or by selecting **'Case Coordination'** followed by **'Close family'** from the left hand side of any screen inside the case.

Close Family	
lease click next to start the family closure process	
istance Travelled	
	Ο
You must enter distance travelled when closing a case	
Back Next	

Prior to closing a Family Member all outstanding actions, Assessments, DPRs must be completed

Distance travelled – You must complete a Distance Travelled form before you close the Family. This is key to knowing how far the Family have come during their Early Help Plan. For more information on the Distance Travelled Tool see section 7.7.

Identification of Needs Tool – You must also complete an ID of Needs Tool at the point of closure, accurately reflecting the changes and any current needs that remain within the family.

Now you can enter your **Final Comments** and the reason for closure from the drop-down list, and click **'save'**.

Close Family

Please click next to start the family	closure process	
Final Summary		
Final Summary		
Closure Details		
Reason for closure	Please Select	•
Final Comments		*
		Ŧ
Closure Date	02/09/2014 12	
Back Save		

9.11 Viewing a Case Snapshot

If you want to view the case details as they existed at any point in the life of the case, then you can do this via the **'View case snapshot'** tab on the **Case Summary** screen.

Case Summary	View case Snapsho	t		0
Create Message				
Case Items	A case snapshot is a view of t	the case as it was on any given day s	ince it was created.	
Case Alert Settings	Change a data and lime to ui	on the case of the point in time. You	will not be able to change anothing of	on the same word it will be
Case Coordination	 clearly marked as a historical 	version.	will not be able to change arguing c	in the case and it will be
View case snapshot				
Audit case events	Inis case was created on 23/	04/2014 at 13:35 - you must enter a	snapshot date after this time.	
	Snapshot Date	30/04/2014	12	
	Spanchot Time	13:35		

You need to select the date and time you want to view and click '**view'**. This will take you back to what the case looked like at that given date.

Case Summary 🖉 💙		2
Case: 9458 - Griffin 🛛 🐲	Lead Worker: Daniel Temelkov	Status: In Progress
Concerns	STON	STORE
State	evie Griffin ale, 21/10/2013 e: 3	2000
Adults	Ch.	STA
 Peter Griffin Male, 01/06/1961 Age: 55 Ag 	is Griffin male, 08/07/1970 e: 46 47	OF G
Significant Others There are currently no significant others a	ssociated with this case	ORIC
Family Address	.91	Multiple addresses exist for this family
13 Goffs Close, , Crawley, West Susse	ex, RH11 8QB	0
Geographical Areas		
District Name: Crawley Dis	trict code: E07000226 East	ing: 526187
Ward Name: Southgate Wa	rd Code: E05007642 Nor	thing: 136225

10. User Settings/My Settings

10.1 Viewing, responding to, filing and deleting Messages

If you would like to view your Messages then you will need to click on the **'My Messages'** tab on the top left hand side of the screen. If you wish to send a message about a case, then you can only do so through the case concerned.

The drop-down box underneath your Messages gives you the opportunity to mark as Read, Unread or File and Delete messages.

Once done, you can find messages by selecting the appropriate tab as shown below:

Inbox	Sent	Filed	Deleted		Q
			You have no	messages	
Delete		7			
File		Update			
Mark as read					
Mark as un-read					
		- 1			

10.2 System Alerts

You can manage the messages you receive about cases by clicking the **'My Settings'** tab followed by **'My Alert Settings'.** You can choose to receive a message on several Alerts within the system. You can also select whether you would like to receive an e-mail reminding you that you have a new message to read in the system.

My details	My alert settings		
My Alert Settings			
My Proxy Settings	West Sussex Early Help can alert you when change	es are made to ca	ses that you have access to. Select which changes to cases you wish
Change Password	to be notified about from the list of notification ev	ents below.	
	This list of settings will be the default for all of you particular case.	ır cases. If you ne	ted to, you can go into an case and override these settings for that
	Message Settings		
	New message notification method	ail	
	Notification Events		
	New action notification	© Yes	No
	Target date for action approaching notification	© Yes	No
	Next review date set notification	© Yes	No
	New service provision notification	© Yes	No
	Change to TAF member details notification		No

For the detailed description of System Messages and their meanings, please refer to the detailed list overleaf.

Notification	Description	Action needed
New action notification	A new action has been set against the Family following assessment or Delivery Plan & Review	You will need to check new Actions and see whether any affect you
Target date for Action approaching notification	Target date for an Action is approaching, and will need to be updated on the system	You will need to check whether this Action affects you
Next review date set notification	Next review date following Delivery Plan & Review	You will need make a note of the new date
New service provision notification	A new Service has started working with the Family	No action, for information only
Change to TAF member details notification	Details of a TAF member has changed e.g. Address	No action, for information only
Archive case administrator change	Closed case transferred to another team	No action, for information only
New draft assessment notification	New Assessment has been generated on the system at draft stage	No action, for information only
Case reopened notification	Previously closed case has been reopened on the system	No action, for information only
Service provision request accepted notification	A Service has accepted the request to work with the Family	No action, for information only
New Distance Travelled	A new Distance Travelled Tool has been created	No action, for information only
Change of child/young person	Child/Young person details have been changed	No action, for information only

details notification		
Target date for Action missed notification	Action has been missed and needs updating on the system	You will need to check whether this Action affects you
New TAF member notification	A Practitioner has been added to the TAF	No action, for information only
Family Member Added To Case	A new person has been added to the Family/Case	You may need to find information in your Service on the new Family member
Change to service provision notification	A Service has been added/removed from working with the Family	No action, for information only
Finalised assessment notification	Assessment is now finalised and ready to view	No action, for information only
Service provision has no end date notification	New Service Provision which will be on-going	No action, for information only
New Lead Worker notification	A new Lead Worker has taken over the case	No action, for information only
Case closure notification	A case has been Closed on the system	No action, for information only
New draft Delivery Plan and Review notification	Draft Delivery Plan and Review has been created	No action, for information only
Service provision ended notification	A Service has ended their involvement with the Family	No action, for information only

Consent statement being modified notification	Consent statement is being updated	No action, for information only
Finalised Delivery Plan and Review notification	Delivery Plan and Review has been finalised and ready to view	No action, for information only
Finalised Consent statement notification	Consent statement has been updated and changes in place	No action, for information only
New Service Provision request notification	A request has been made for your Service to work with a family	You will need to accept or reject this request. The Lead Worker should contact you with more information
Next review date missed notification	The next review date for the Family has been missed and needs updating	The Lead Worker needs to check the review date and update the system
Adult Age notification	A child/Young Person has reached the age of 18	No action, for information only
Service Provision request rejected notification	Service Provision request has been rejected by the Service	The Lead Worker will need to confirm why it has been rejected
TAF member removed notification	A Practitioner has been removed from the Team Around the Family	No action, for information only
Service Provision end date change notification	The end date of a Service working with a Family has been extended/shortened	No action, for information only

10.3 Updating your personal details

It is recommended that you always keep your personal details up to date, thus ensuring that other professionals have access to your most recent contact details should they need to contact you regarding an Early Help Plan.

You can edit your user details, address and contact number at any point by selecting the 'My settings' tab followed by 'My details'.

My Messages	My cases	Check for case	Start new case	My settings	Help
n this section:	My Details				
My details	My Details				(
My Alert Settings					10
My Proxy Settings	Here you can edit yo	our user information. Make	any changes and press 'Save' to	o save your changes.	
- 2010 - Cres					
Change Password	User Details				
Change Password	User Details Title	Mr			
Change Password	User Details Title First name(s) *	Mr Dav	vid	•	
Change Password	User Details Title First name(s) * Surname *	Mr Dav Hoo	vid		
Change Password	User Details Title First name(s) * Surname * Known as	Mr Dav Hor	vid oper	•	

10.4 Changing your own Password

You can change your Password by selecting the 'My Settings' tab followed by 'Change Password'.

You are advised to change your Password on a regular basis in order to ensure that information on Holistix is kept secure and reducing the risk of unauthorised access to the system.

West Sussex Early Help			Logged in as David Hooper	Version: V0.0112 Environment: UAT	
My Messages	My cases	Check for case	Start new case	My settings	Help
In this section: My details	My Details > Ch	ange Password			0
My Alert Settings	changere				
My Proxy Settings	Here you can ch	ange your password.			
Change Password	Current Password New Password Confirm Passw	* vord *			

10.5 Proxy Settings – Allowing a colleague to act on your behalf or acting on behalf of a colleague

If at any point you need someone to act on your behalf in the system e.g. you are taking leave, you can contact the Holistix Support Team for your area (see p.4). You will need to provide them with details on who needs the access and the duration they need to act on your behalf.

Once you have been set up to access another user's caseload, you can access it via your own Login account. To select which user account you want to work from, you will need to select the **'My Settings'** tab followed by **'My Proxy Settings'**. Once you are on the page you can select the user you want to work as using the drop-down box.

My Messages	My cases	Check for case	Start new case	My settings	Help
In this section: My details	My Details > M	ly Proxy Settings			0
My Alert Settings		settings			
My Proxy Settings	Use this screen	to act on behalf of another user	on their West Sussex Early Help	cases, or to switch back to your	own cases if you are
Change Password	already acting a	as another user.			
	Your manager remain in force will remind you	or West Sussex Early Help local r until you log off or select a diff of that fact on every page.	nanagement team will have def erent name from the list below.	ïined who you can act on behalf While you are acting on behalf c	of - these privileges will of another user, Holistix
	Select your targ	et user from the list below and	press 'Apply'.		
	Target user	Da	wid Hooper	•	
	Apply				

Note: If at any point you are logged out of the system, you will be logged back in as yourself and you will need to go back to Proxy Settings to change user.

11. Pathways of Support

The Support structure in place to help you with any obstacles you may encounter while using Holistix is outlined below.

On-line resources				
User Guide	https://www.ges-online.com/WestSussex/	fCAF/Live/help/HolistixEarly	HelpUserGuidance.pdf	
FAQs	https://www.ges-online.com/WestSussex/	fCAF/Live/help/HolistixFreq	uentlyAskedQuestionsv01.p	af
Assessment template	https://www.ges-onine.com/WestSussex/	fCAF/Live/help/WestSussex	EarlyHelpPlanAssessmentv0	1.pdf
Where available, screen help can	be accessed by clicking the 😨 icon w	vithin HolistiX.		
Early Help Champions	·]	Early Help Champion	s Network
Your organisation should have will be able to assist with your a	a named Early Help Champion who yuery.	Support for Early Help Champions	Early Help Champions are Network Meetings to feed need to be addressed an support. Early Help Champions Net place regularly across the for dates/ locations and b on the Learning and Deve (www.westsussexcpd.co.u	invited to attend back issues that d to get additional work Meetings take County. Please loc ook yourself a plad elopment Gateway (k)
Your organisation should have will be able to assist with your a HolistiX Support	a named Early Help Champion who juery.	Support for Early Help Champions	Early Help Champions are Network Meetings to feed need to be addressed an support. Early Help Champions Net place regulary across the for dates/ locations and b on the Learning and Deve (www.westsussexcpd.co.u	invited to attend I back issues that d to get additional twork Meetings takk County, Piedse loo look yourself a plac elopment Gateway (k)
Your organisation should have will be able to assist with your a HolistiX Support Adur/ Worthing	a named Early Help Champion who juery. AdurFSN@westsussex.gosx.gov. WorthingFSN@westsussex.gosx.gov.	Support for Early Help Champions	Eary Help Champions are Network Meetings to feed heed to be addressed an support. Eary Help Champions Net place regulary across the for dates/ locations and b on the Learning and Deve (www.westsussexcpd.co.u Mel Benham	invited to attend I back issues that d to get additional work Meetings takk County, Piease loo rook yourself a plac elopment Gateway (k) 033022 23759
Your organisation should have will be able to assist with your a HolistiX Support Adur/ Worthing Arun/ Chichester	a named Early Help Champion who juery. AdurFSN@westsussex.gosx.gov. WorthingFSN@westsussex.gosx.gov. ArunFSN@westsussex.gosx.gov. ChichesterFSN@westsussex.gosx.gov.	Support for Early Help Champions	Early Help Champions are Network Meetings to feed need to be addressed an support. Early Help Champions Net place regularly across the for dates' locations and b on the Learning and Deve (www.westsussexopd.co.) Mel Benham Lawrence Reeves	invited to attend back issues that d to get additional work Meetings take County. Please loo ook yourself a plac klopment Gateway ikj 033022 23753 033022 23753

12. Timescales

Below is a snapshot of the timescales considered to be acceptable for completion of each segment of the Early Help Plan:

Step within the Early Help Plan	Timescale for completion	Additional information
Finalising the simple Assessment and Signs of Safety Conversation.	It is recommended that the Assessment is saved as final within 20 working days from initiation of the Plan.	All family members are recorded, the SoS conversation is present and the Simple Assessment is saved as final.
Finalising the initial Delivery Plan & Review/Distance Travelled Tool.	It is recommended that the initial Delivery Plan & Review is finalised within 6 to 8 weeks from the date that the Simple assessment was finalised.	A record of a TAF (Team around the Family) meeting is finalised, capturing a current SoS conversation, Distance Travelled tool, Action Plan and the voice of all family members.
Finalising subsequent Delivery Plan & Review/Distance Travelled Tool.	It is recommended that any subsequent Delivery Plan & Review is finalised within 6 to 8 weeks from the date that the Simple assessment was finalised.	As above.

Appendix A: Distance Travelled Tool

					: !! !	Not an issue
		1	4	7	10	√
Education - 'Be able to learn and be ready for school						
and work'		_				
engagement in their child's education?	0	•	•	0	0	0
 Are there any worries about children's engagement 	~		-	0	-	0
in learning?	2			0		0
3. Are there any worries about children's school attendance?	0	•	•	0	•	0
 Are there any worries about the children's behaviour in school? 	0	•	•	0	•	0
5. Are there any worries about bullying (children &	0	•	•	0	•	0
young people)?	Ŭ		, in the second s	Ŭ	Ŭ	Ŭ
Family Life - 'Families receive the support they need early'						
6. Are there any worries about relationships between family members (issues with secure attachments?	0	•	•	0	•	0
7 Are there any worries about caring responsibilities	-					
impacting negatively on children within the family?	0	•	•	0	•	0
8. Are there any worries about boundary setting and discipline?	7	•	•	0	•	0
9. Are there any worries about family engagement with other professionals or services?	0	•	•	0	•	0
10. Are there any worries about the availability of family support networks?	0	•	•	0	•	0
11. Are there any worries about the supervision of children within the family?	0	•	•	0	•	0
12. Are there any worries about the provision of a						
stimulating environment for children within the family	2	•	•	0	0	0
e.g. age appropriate toys/activities?						
13. Are there any worries about personal hygiene?	0	•	•	0	0	0
14. Are there any worries that the housing/environment impacts the child's wellbeing?	0	•	•	0	0	0
Health and Wellbeing - 'Have improved mental and						
physical health'						
conduct disorder in the family?	0	•	•	0	•	0
16. Are there any worries about engagement with health professionals?	0	•	•	0	•	0
17. Are there any worries about drugs, substance or alcohol misuse by any of the child/ren in the family?	0	•	•	0	0	0
18. Are there any worries about drugs, substance or	0	•	•	0	•	0
accorol misuse by any adult in the family? 19. Are there any mental health and wellbeing worries						
affecting any child/ren in the family?	0	•	•	0	0	0
20. Are there any mental health and wellbeing worries affecting any adult in the family?	0	•	•	0	0	0

21. Are there any worries about chronic health condition/ disability?	0	•	•	0	•	0
22. Are there any worries about children meeting speech, language and communication milestones?	?	•	•	0	•	0
23. Are there any worries about children meeting physical child development milestones?	0	•	•	0	•	0
24. Are there any worries about a new mother in respect of their mental or physical health?	0	•	•	0	0	0
Community Life - 'Be part of and contribute to the local community'	I					
25. Are there any worries about child/ren engagement in positive activities outside the home?	0	•	•	0	•	0
26. Are there any worries about children's relationships with peers?	7	•	•	0	•	0
27. Are there any worries about offending by any family member?	0	•	•	0	0	0
28. Are there any worries about anti-social behaviour (ASB) by any family member?	?	•	•	0	•	0
29. Are there any worries about family/individual participating in racial or other discriminatory harassment/intimidation?	0	•	•	0	•	0
30. Are there any worries about being subject to other intimidation/harassment?	0	•	•	0	•	0
Domestic Violence or Abuse - 'Be safe and secure'						
31. Are there any worries about family violence or abusive behaviour (this could be between any members of the family)?	0	•	•	0	•	0
32. Are there any worries about personal safety for one or more of the family members?	0	•	•	0	•	0
Social & Financial Independence - 'Have the skills to increase their independence and fulfil their ambitions'						
33. Are there any worries about employment/ worklessness within the family?	0	•	•	0	•	0
34. Are there any worries about family debt? (This may include rent arrears, credit card bills, utility bills)	0	•	•	0	•	0
35. Are there any worries about financial exclusion?	0	•	•	0	0	0
36. Are there any worries about housing?	?	•	•	0	0	0
37. Are there any worries about a young person who is not in employment, education or training?	0	•	•	0	•	0

Appendix B: Tips for completing the Distance Travelled tool

The below information provides guidance around establishing the relevant levels of worry while completing the Tool.

	High	Medium	Low	Working Well	Not an issue
1. Are there any worries	Parents/carers show	Parents provide low	Parent(s) support is	Parents are engaged	Selected for questions
about parents / carers	no interest/are not	levels of support	inconsistent, although	positively in supporting	where the indicated
engagement in their child's	involved in children's		children's are doing	their children's	worries were never
education?	education e.g. no help		well in school	education	present.
	with homework or				
	support for learning at				
	home, do not attend				
	meetings at school or				
	meet/engage with				
	school staff to discuss				
	progress/address				
	issues				
2. Are there any worries	Disengaged from	Little engagement in	Engaged in learning but	All the children in the	Selected for guestions
about children's	learning	learning, regular	issues starting to	family are engaged with	where the indicated
engagement in learning?		truanting, serious	emerge, i.e. occasional	their school and	worries were never
		behavioural issues	truanting, low level	learning plan	present.
			behavioural issues		
3 Are there any worries	Attendance levels	Attendance levels at	Attendance levels of	All children attending	Selected for questions
shout children's school	helow 65% or			school on a regular	where the indicated
about children's school	permanently exclude	0070-0370	8070-9470	hacic	worries were never
attendance:	permanently exclude			00313	nresent
					present.
4. Are there any worries	Child attending PRU	Behavioural issues	An emerging pattern of	No worries about a	Selected for questions
about the children's	or equivalent with	leading to including	worrying behaviour	child's behaviour in	where the indicated
behaviour in school?	high risk of exclusion,	internal or fixed term	that impacts their	school	worries were never
	chronic school refusal	exclusion or specialist	ability to learn		present.

Education - 'Be able to learn and be ready for school and work....'

	High	Medium	Low	Working Well	Not an issue
		school intervention			
5. Are there any worries	One or more children	Low level bullying has	No outward signs	There are no concerns	Selected for questions
about bullying (children &	involved in bullying	been identified and is	bullying is taking place	about bullying	where the indicated
young people)?	others or a child	being managed by the			worries were never
	discloses that they are	parents and/or school			present.
	being bullied				
	(physically or				
	emotionally)				

Family Life - 'Families receive the support they need early....'

	High	Medium	Low	Working Well	Not an issue
6. Are there any worries	Family relationships are	Family relationships are	Family relationships are	Family relationships/	Selected for questions
about relationships	always inconsistent,	regularly inconsistent,	occasionally	attachments are warm,	where the indicated
between family	unpredictable &	unpredictable &	inconsistent,	nurturing and	worries were never
members/issues with secure	chaotic. There are	chaotic. Issues arise	unpredictable and	consistent. Family can	present.
attachments?	strong signs of poor	two to four times a	chaotic. Hard to resolve	resolve tensions and	
	attachment in the	week	issues arise less than	arguments in a	
	parent child		twice a week	constructive way	
	relationship. Issues				
	arise on an almost daily				
	basis				
7. Are there any worries	Caring responsibilities	Caring responsibilities	Caring responsibilities	Children in the family	Selected for questions
about caring responsibilities	having a significant	impacting negatively on	have the potential to	are not negatively	where the indicated
impacting negatively on	negative impact on	this child or young	have a negative impact	impacted by holding	worries were never
children within the family?	child or young person	person e.g. limited in	on child or young	inappropriate caring	present.
	and may deteriorate	their free time	person now or in the	responsibilities within	
	further. E.g. children	compared to peers	future	the family	
	are completely isolated				
	from peer groups				
8. Are there any worries	Inappropriate	Challenges for	Boundary	Parents are able to set	Selected for questions

	High	Medium	Low	Working Well	Not an issue
about boundary setting and discipline?	boundaries/discipline (too much or too little)	parents/carers in boundary setting &/or imposing discipline evident with all children within the family	setting/imposing discipline is an issue for parents/carers for children who have particularly challenging behaviour, e.g. ADHD, truanting, offending	and adhere to consistent boundaries for all children in the family. The children have a secure sense of routine and discipline	where the indicated worries were never present.
9. Are there any worries about family engagement with other professionals or services?	Chronic history of non- engagement and resistance that impacts the child's health and safety	Evidence that family has missed key appointments to support a child's wellbeing	Emerging pattern of missed appointments	Family engages well with services	Selected for questions where the indicated worries were never present.
10. Are there any worries about the availability of family support networks?	Family has few or no family/friends to act as a support network	Struggling to deal effectively with day to day tasks due to lack of support network	Family relatively isolated from wider support network, although managing well	There is a consistent and positive support network provided by family and friends to help achieve change and meet the needs of family members	Selected for questions where the indicated worries were never present.
11. Are there any worries about the supervision of children within the family?	Inappropriate supervision of children by parents/carers e.g. home alone	Parents/carers regularly do not know the whereabouts of their child/ren. By regularly we mean two to four times a week	Parents/carers sometimes do not know the whereabouts of their child/ren. By sometimes we mean once per week or less	Parents provide appropriate supervision for all children and ensure they are safe at all times	Selected for questions where the indicated worries were never present.
12. Are there any worries about the provision of a stimulating environment for children within the family e.g. age appropriate	Children within the family rarely have access to age appropriate toys and/or activities.	Children within the family rarely have access to age appropriate toys and/or activities. By	The home environment is stimulating, although they have limited access to age appropriate toys	Parents provide promote a stimulating environment for all children	Selected for questions where the indicated worries were never present.

	High	Medium	Low	Working Well	Not an issue
toys/activities?	Parents fail to provide	rarely we mean less			
	stimulating	than once per week			
	environment				
13. Are there any worries	Significant hygiene	Escalating issues	Emerging issues related	There are no concerns	Selected for questions
about personal hygiene?	issues leading to	related to personal	to personal hygiene, no	about personal hygiene	where the indicated
	negative impacts on	hygiene, negative	significant impact on		worries were never
	individual and home	impacts starting to	individual or family		present.
	environment	emerge			
14. Are there any worries	The child's health and	There is a significant	Low level housing	There is a stable and	Selected for questions
that the	wellbeing is	lack of hygiene and	needs that could	safe home	where the indicated
housing/environment	significantly impacted	appropriate	impact the child's	environment with good	worries were never
impacts the child's	by the housing	accommodation to	health and wellbeing	hygiene and	present.
wellbeing?	environment	meet the needs of the		appropriate furniture	
		children			

Health and Wellbeing - 'Have improved mental and physical health....'

	High	Medium	Low	Working Well	Not an issue
15. Are there any worries	Where there is a child	Several conduct	A child in the family	There are no children in	Selected for questions
about any children with a	with extreme	problems and causes	with a diagnosed	the family with a	where the indicated
conduct disorder in the	behaviour issues;	moderate harm to	disorder that is being	conduct disorder	worries were never
family?	causes considerable	others	well managed		present.
Note: Conduct disorder includes; Physical cruelty, destructiveness, lying and stealing, truancy and running away from home	harm to others				
16. Are there any worries	Refuse to engage with	Inconsistent	Engage with health	The family are engaged	Selected for questions
about engagement with	health professionals	engagement with	professionals but	with health	where the indicated
health professionals?		health professionals,	limited action on advice	professionals	worries were never

	High	Medium	Low	Working Well	Not an issue
		no action on advice			present.
17. Are there any worries about drugs, substance or alcohol misuse by any of the child/ren in the family?	Dependent drug or alcohol user – psychological dependence, difficulty controlling its use despite negative consequences	Any use of drugs or alcohol should be considered harmful. The assessment should take the age of the child into account	No obvious sign of alcohol or drug use	There are no concerns about drug, alcohol use/misuse	Selected for questions where the indicated worries were never present.
 18. Are there any worries about drugs, substance or alcohol misuse by any adult in the family? Note: Record detail appertaining to individual family members in the assessment and review pages of Holistix 	Dependent drug or alcohol user – psychological dependence, difficulty controlling its use despite negative consequences	'Harmful drug use' – pattern of drug use, or regular drinking which is causing damage to physical or mental health	'Hazardous drug use' – no specific disorder but involved in recreational drug taking or limited alcohol consumption	There are no concerns about drug, alcohol use/misuse	Selected for questions where the indicated worries were never present.
 19. Are there any mental health and wellbeing worries affecting any child/ren in the family? Note: Record detail appertaining to individual family members in the assessment and review pages of Holistix 	Serious and enduring mental health issues	Significant emotional experiences such as depression, anxiety or panic attacks	Low levels of concern in relation to mental health, such as short term depression, low level anxiety	There are no concerns about mental health and wellbeing	Selected for questions where the indicated worries were never present.
20. Are there any mental health and wellbeing worries affecting any adult	Serious and enduring mental health issues	Significant emotional experiences such as depression, anxiety or	Low levels of concern in relation to mental health, such as short	There are no concerns about mental health and wellbeing	Selected for questions where the indicated worries were never

	High	Medium	Low	Working Well	Not an issue
in the family? Note: Record detail appertaining to individual family members in the assessment and review pages of Holistix		panic attacks	term depression, low level anxiety		present.
21. Are there any worries about chronic health condition/ disability?	Family member's chronic health condition/disability impacting negatively on other members of the family	Escalating concerns regarding family member with chronic health condition /disability	Family member has a chronic health condition /disability which is managed but has the potential to deteriorate	There are no concerns about chronic health condition disability	Selected for questions where the indicated worries were never present.
22. Are there any worries about children meeting speech, language and communication milestones?	Child has profound and multiple speech, language and communication difficulties	Child appears to be significantly delayed in meeting speech, language and communication milestones	Child appears to be delayed in meeting speech, language and communication milestones	There are no concerns about children meeting speech, language, and communication milestones	Selected for questions where the indicated worries were never present.
23. Are there any worries about children meeting physical child development milestones?	Child has profound development difficulties, which can be physical, emotional, social or cognitive	Child is significantly delayed in meeting development milestones	Child appears to be delayed in meeting development milestones	There are no concerns about meeting child development milestones	Selected for questions where the indicated worries were never present.
24. Are there any worries about a new mother in respect of their mental or physical health?	There is serious risk of harm to one or more children within the family	Undiagnosed condition such as stress, anxiety and post-natal depression where there are no support networks in place	Issues are well managed with a plan in place	There are no concerns about the new mother's mental or physical health	Selected for questions where the indicated worries were never present.

Community Life - 'Be part of and contribute to the local community....'

	High	Medium	Low	Working Well	Not an issue
25. Are there any worries about child/ren engagement in positive activities outside the home?	Children in the family have no engagement in positive activities outside the home	Children have limited access to outside activities or engage infrequently	Children are able and do engage in activities outside the home	There are no concerns about a children's engagement with positive activities outside the home	Selected for questions where the indicated worries were never present.
26. Are there any worries about children's relationships with peers?	Unable to sustain peer relationships	Inappropriate peer group	Some difficulties developing and maintaining peer relationships	There are no identifiable concerns	Selected for questions where the indicated worries were never present.
27. Are there any worries about offending by any family member?	Has criminal convictions/has received a custodial or community sentence in the last year /is under Probation Services	Has received final warnings/referral order/ received a caution	Is known to the police/received a reprimand	No concerns about offending by any member of the family	Selected for questions where the indicated worries were never present.
28. Are there any worries about anti-social behaviour (ASB) by any family member?	Engaged in anti-social behaviour which has resulted in formal actions being taken i.e. court related orders/convictions	Engaged in anti-social behaviour which has resulted in direct intervention from ASB Team. May have received a warning but no conviction. Is at risk of formal action	Is engaged in anti-social behaviour but no formal actions have been made. May be being monitored by or is known to ASB Team	No concerns about ASB by any family member	Selected for questions where the indicated worries were never present.
29. Are there any worries about family/individual participating in racial or other discriminatory harassment/intimidation?	Family experiencing racial abuse or intimidation on a regular basis	The family have experienced some form of racial abuse or harassment	No obvious signs of racial intimidation or harassment	No concerns about racial intimidation or harassment	Selected for questions where the indicated worries were never present.

	High	Medium	Low	Working Well	Not an issue
Note: This includes groups or individuals making threats, verbal. Family/individual involved in or victim of racial harassment/intimidation abuse, bullying, following people, pestering people, voyeurism, sending nasty/offensive letters, obscene/nuisance phone calls, menacing gestures					
30. Are there any worries about being subject to other intimidation/harassment? Note: This can be on the grounds of sexual orientation, gender, religion, disability, age. This includes groups or individuals making threats, Selected for questions where the indicated worries were never present. verbal abuse, bullying, following people, pestering people, voyeurism, sending nasty/offensive letters, obscene/nuisance phone calls, menacing gestures	Individual(s) involved in or victim of harassment. As a consequence [something that impacts on day to day living]	Individual involved in or victim of other harassment/intimidatio n	Some family members are exhibiting behaviour which could be interpreted as intimidation/harassme nt	Family not experiencing or involved in intimidation or harassment	Selected for questions where the indicated worries were never present.

Domestic Violence or Abuse - 'Be safe and secure....'

	High	Medium	Low	Working Well	Not an issue
31. Are there any worries	Evidence of family	Frequent verbal	Some evidence of	There are no worries	Selected for questions
about family violence or	violence/abusive	arguments triggering	verbal arguments with	about family violence	where the indicated
abusive behaviour (this	behaviour	unpredicted behaviour	the potential to	or abusive behaviour.	worries were never
could be between any			escalate	All family members are	present.
members of the family)?				able to manage feelings	
				of anger and frustration	
				without being violent	
				or abusive to each	
				other	
32. Are there any worries	One or more	One or more family	Some concern about	There are no concerns	Selected for questions
about personal safety for	individual's behaviour	members are clearly	one or more family	about personal safety	where the indicated
one or more of the family	or actions place	unable to identify	member's ability to	for any member of the	worries were never
members?	themselves in	danger	identify danger	family	present.
	situations where they				
	are physically and/or				
	sexually vulnerable				

Social & Financial Independence - 'Have the skills to increase their independence and fulfil their ambitions....'

	High	Medium	Low	Working Well	Not an issue
33. Are there any worries	No eligible adults in the	One or more eligible	No eligible adult	All eligible adults in the	Selected for questions
about employment/	family are currently in	adults unemployed for	member of the family	family are in full or part	where the indicated
worklessness within the	full or part time	6 months or more and	unemployed for more	time employment	worries were never
family?	employment and one	claiming Universal	than 6 months or		present.
	or more are claiming	Credit or child at risk of	claiming Universal		
	Universal Credit	becoming NEET	Credit		
34. Are there any worries	Where court orders are	Where the issues of	Family receiving	The family are	Selected for questions
about family debt? (This	being sought to	debt are been ignored	professional support to	financially secure	where the indicated
may include rent arrears,	reprocess goods or	by the family and/or	manage debt		worries were never
credit card bills, utility bills)	accommodation	first stage of			present.
		repossession are			

	High	Medium	Low	Working Well	Not an issue
		intended			
35. Are there any worries about financial exclusion?	There is a reliance on alternative forms of credit such as Doorstep Lenders and Pawn Brokers	Low income family with limited access to recognised forms of credit	Family able to access appropriate financial support	The family are financially secure	Selected for questions where the indicated worries were never present.
36. Are there any worries about housing? Note: Includes Tenure, Overcrowding etc.	Living in a hostel/B&B/homeless/l iving with friends/relatives. Or, Home environment (e.g. space & physical conditions such as damp, heating, poor state of repair) having a negative impact on health & wellbeing of family membars	Struggling to meet payments/may lose tenancy/under threat of losing their home from debt/ASB etc.	In temporary accommodation/ frequent house moves/short-term tenancy. Mild concerns about space, tidiness and/or state of repairs	The family are living in secure and adequate accommodation which is kept in a clean and reasonably tidy condition that meets their needs	Selected for questions where the indicated worries were never present.
37. Are there any worries about a young person who is not in employment, education or training?	Young people resistant and not engaging with NEET services	Emerging pattern of disengagement from NEET services	There is an emerging risk that the young person may not engage in education, employment or training after the age of 16	The young person is in education, employment or training	Selected for questions where the indicated worries were never present.