

Frequently Asked Questions (FAQ's)

Q1. Who is the Holistix Support for my area?

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Q2. What is QES Holistix?

A. Holistix is a flexible web based tool. It forms part of the Local Authority's Early Help strategy to assess and case manage needs. QES is the company that has produced the software.

Q3. What do I do if I have forgotten my user name or password?

A. If you have forgotten your password then you can click the 'Forgotten Password' link on the Holistix homepage. You will need to enter your username, and then a temporary password will be sent to your e-mail address.

If you have forgotten your username then you will need to contact your local Holistix Support who will be able to give you this.

Q4. Why do I need to enter an Authentication Code after my user name and password?

A. This is an additional level of security, to help ensure that only authorised users can access the information contained in Holistix. A new Authentication Code is emailed to you each time you log on, so there's no need to keep old ones.

Q5. What training or user guidance is available?

A. The Holistix training & support package is available through the [Learning & Development Gateway](#). This includes:

- The Family Support Offer Briefing
- Signs of Safety and Well-being
- Early Help Plans
- Holistix

The Holistix Early Help system has been designed for a wide variety of practitioners and can be used without classroom based training. A system user guide has been produced and can be viewed here [Holistix Early Help User Guidance](#).

There are also 'Help' pages available from every screen. If you have problems using Holistix, the first point of contact is your Holistix Support (see Q1 above).

Q6. What information can I record in Holistix?

A. The system should enable you to record any information about an Early Help Plan, such as details of the family members, the family assessment, details of review meetings, action plans, measures of progress, case notes, and case documents.

At a high level, the main steps in Holistix are (i) enter family members, (ii) create & finalise the assessment, (iii) add practitioners to the TAF, (iv) maintain the plan, add details of review meeting(s) & progress made.

Q7. Who can see the information that I enter into Holistix?

A. The vast majority of system users are “standard” users. Therefore: (i) they can create new cases and act as the Lead Worker; and (ii) they can view cases that they aren’t leading if they are invited to do so by the Lead Worker (so they are part of the Team Around the Family).

As a standard user, it is possible to search the entire system for any child or adult, but the information will be limited until you are granted access by the Lead Worker.

There are also a smaller number of users with wider access than that of a standard user - these will be system administrators, managers, or those responsible for producing management information.

Q8. How do practitioners gain access to view a case on Holistix?

A. When the Lead Worker adds a practitioner to the TAF (Team Around the Family) it enables that practitioner to view the case in Holistix. Practitioners can contact the Lead Worker to request that they be added.

Q9. How is the Consent Statement used by the system?

A. When you create the Consent Statement, you are recording that the family are happy for their information to be shared with organisations or services working with them. When you, as the Lead Worker, invite other professionals to become part of the TAF (Team Around the Family), the system will automatically check for a completed Consent Statement and warn you if it’s missing or still in draft status.

Q10. I am working with a family that may already be recorded on Holistix. Can I check this?

A. Yes. Through the option “Check for case”, you can search for the family that you are working with. If they are already on the system, you can send a message to the Lead Worker to request access.

Q11. Can a family member be entered into two different cases?

A. A child should not be entered into more than one open case. If there is a need to enter an adult into a 2nd case, they should be added as a “significant other”. You should check for the existence of family members on the system (see Q10 above) before adding them.

Q12. Can I re-open a “closed” case?

A. If you are working with a family that are already recorded on Holistix, but the case is closed, it is possible for the case to be re-opened (but only if a recently closed case). When you find a closed case, the system will direct you to your Holistix Support who can advise further.

Q13. Can case notes be recorded on Holistix?

A. Yes. Case notes can be added by anyone with access to the case. A case note can include an attached document if required.

Q14. Can documents be attached to a case on Holistix?

A. Yes. As above, documents can be included with a case note. The Lead Worker can also maintain document folders and move documents if necessary.

Q15. Can I record who has Parental Responsibility and who is Primary Carer?

A. The system prompts you to identify who has Parental Responsibility for a child. If you also want to record the Primary Carer, you can enter that information in a comments box.

Q16. Can I record the relationships between family members?

A. Yes. There is a pick-list from which you can select the appropriate relationship between any family members, such as Person X is “Parent” of Person Y.

Q17. Should children over 18 years be added as Children or Adults?

A. Add these as adults. You'll still be able to attach the correct relationship (e.g. Child) to other adults in the family.


Q18. Can I add a reference number that doesn't appear in the list of suggestions?

A. Yes. The list in Holistix is not exhaustive, but does include common numbers such as NHS number. Extra references can always be included against "Other".

Q19. The family I'm working with has moved address. Should I overwrite their address in Holistix or add the new one?

A. It can be useful to retain information about their previous address. So it is suggested that you add the new address, and write a comment against both the old and new, showing the date of the move, such as "New address w.e.f.dd/mm/yyyy".

Q20. How can I print off the whole Early Help Assessment (without going into each section)?

A. By clicking the  icon on the Assessment, you generate a PDF of the whole assessment. You can then elect to print off all pages or specific pages.

Q21. Is there a blank Early Help Assessment template which I can print off and take out to the family to write my notes on during the assessment?

A. If you create the family on Holistix, then start an Assessment, you can print the Assessment document with just the family details populated. Alternatively, you can find a completely blank Assessment here [West Sussex Early Help Plan Assessment](#).

Q22. Where can I find guidance on recognising Neglect?

A. This information, along with other guidance & tools for professionals, is available on the [WS Safeguarding Children Board website](#).

Q23. Why is it mandatory for me to enter something in the Working Safely section of the Assessment?

A. Even if there are no concerns regarding practitioners working with a family, you need to consider it, and state that there are none.

Q24. Who can be assigned Actions?

A. Any member(s) of the family can be the subject of an Action. Any member(s) of the TAF (including family members) can be tasked with an Action. If "significant others" need to be included, then a member of the TAF must be recorded as taking responsibility on behalf of the significant other.

Q25. In the Delivery Plan & Review, whose opinion should be recorded against the scaling question "Parents' confidence to create & maintain change"?

A. As the question implies, this is a measure of the confidence of the parents. Not the practitioners.

Q26. I am getting alerts sent to my e-mail address, what do they mean?

A. If you receive an e-mail from the system it means someone/something has triggered an alert on one of your cases. This can be anything from someone wanting access to your case, an action nearing its completion date, or a new assessment being completed. A full list of the alerts and what they mean can be found in section 9.2 of the [Holistix Early Help User Guidance](#).

The alerts you receive are determined by your own settings and can be turned on or off from the 'My settings' section in Holistix.

Q27. I am currently the Lead Worker on a case but another practitioner has agreed to take on this role. Can this be transferred?

A. Yes. As the Lead Worker, the system allows you to Change Lead Worker to another TAF member (via the Case Coordination menu). Obviously, you would agree this beforehand with the practitioner.

Q28. The current Lead Worker is off sick, or on holiday; can someone else act on their behalf?

A. Yes. One way to do this is for a colleague to be set up with “proxy” access to the Lead Worker’s cases. Contact your Holistix Support to arrange this. An alternative way to deal with long-term absence is to transfer the Lead Worker role to another TAF member (see the question above).

Q29. How can I find information on cases that were previously held in the old eCAF system?

A. Contact your local Holistix Support (see Q1 above).

Q30. How do I report an error or fault with the system?

A. Contact your local Holistix Support (see Q1 above).