



DIPS

Doncaster Integrated People Solution

Early Help External Users

Training Guide



Revision History

File Location: S:\Integrated_People_Solution_DIPS_Training\Training Guides\Childrens\2023 Childrens Redesign Guide Updates\Early Help\External






















DATE	VERSION	DESCRIPTION	AUTHOR
28.04.2020	1.0	Guide Created	Rachel Shillito
13.07.2020	2.0	Guide Updated with Step Up Information	Rachel Shillito
10.03.2023	2.0	Children's Redesign Update	Natalie McMenamin

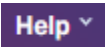
Additional Support and Guidance:

This guide should be read in conjunction with the Step Up and Step Down Guides for additional support.

Mosaic Hints & Tips

Icon List:

 <p>Change Workview Workview can be changed to Full, Narrow or Closed.</p>	 <p>Act For Allows you to Act For another worker.</p>	 <p>Team View Allows you to view other members of your team and their work.</p>
 <p>Incoming Work Start new form.</p>	 <p>Resume Work Continue a form that is not complete.</p>	 <p>Future Work Needs to be started in the future.</p>
 <p>Save Saves the form.</p>	 <p>Finish Work Completes the form. Can only be used when all mandatory info is complete.</p>	 <p>Refresh Refresh the current form. Used to update information.</p>
 <p>Requests Send request to be approved by another worker.</p>	 <p>Optional Forms & Letters Opens optional forms and letters relating to the work/form.</p>	 <p>Paperclip Attach documents to the work/form.</p>
 <p>Show Subject Summary Takes you to the person summary screen. You can update information here. If you update information, you will need to Refresh the form.</p>	 <p>Pencil Edit information in the form. You will not be able to edit the person's information who you are working with.</p>	 <p>Find Find a person.</p>
 <p>Yellow Cog Field is pre-populated but can be changed</p>	 <p>Grey Cog Field is pre-populated and cannot be changed</p>	 <p>Add Add an action to the form. This determines the next part of the workflow.</p>
 <p>Missing Mandatory Information Mandatory information has not been filled in.</p>	 <p>Workflow Map View workflow map</p>	 <p>Genogram View persons relationships</p>

You can use the  section at the top of the page for further assistance.

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Adding and Ending Professional Involvements

Adding your involvement to a case means that the child's name will appear in the allocations folder in your workview. However you will only see the work in your current folder that is assigned to you.

Natalie McMenamin

- Allocations (1) Bulk Assign Refresh
- Recently viewed Refresh
- Current work Bulk Assign Refresh

1. To record any **worker** as a **professional worker** for the child, from the Persons Summary page go to the **Person Details** Section. Then, select **Worker Relationships**.

Person summary - Kai James Peterson (10457023) born 27 Oct 2013 (9 years old)

Person details > Basic details
Start
Case notes
Chronologies
Documents
Events
Visits
Education >
Health >
Looked after >
Consent
Legal status
Offences

Worker relationships

Current work Workflow map History
No current work

2. Select **Add**.

Worker relationships - Kai James Peterson (10457023) born 27 Oct 2013 (9 years old)

Worker Relationships	Telephone	From Date	To Date
----------------------	-----------	-----------	---------

Add OK

3. Use **Find** to search for the Worker.

Add worker relationship - Kai James Peterson (10457023) born 27 Oct 2013 (9 years old)

Fields marked with a * are required

Worker * **Find**

Relationship type *

From date * 08/02/2023

To date

Save **Cancel**

4. **Search** for the Workers name and then select **Find**.

Find workers

At least one field marked with a # is required

Last name #

First name #

Find **Cancel**

Other workers	Job title	Role	Organisation
---------------	-----------	------	--------------

5. Under **Other Workers** – the workers name appears, select their name.

Find workers

At least one field marked with a # is required

Last name #

First name #

Find **Cancel**

Other workers	Job title	Role	Organisation
Natalie McMenamin		Demonstrator	Doncaster Borough Council

6. Enter the Relationships Details as necessary (Remember * is mandatory) and then select **Save**.

Add worker relationship - Kai James Peterson (10457023) born 27 Oct 2013 (9 years old)

Fields marked with a * are required

Worker *

Relationship type *

From date *

To date

7. Select **Ok** to return to the person's summary page.

8. To **end** a worker as a **professional worker** for the child, from the **Persons Summary page** go to the **Person Details Section**. Then, select **Worker Relationships**.

Person summary - Richard Avila Howard (10456961) born 17 Mar 2013 (9 years old)

Person details > Basic details

Start

Case notes

Chronologies

Documents

Events

Visits

Education >

Health >

Looked after >

Consent

Legal status

Offences

Worker relationships

Information

Current work

Service user groups

Disability

Professional and organisational relationships

Civic Offices
Waterdale
Doncaster
DN1 3BU (View map)
(In authority area)
Cluster team(s): No teams serve this address

Children suffering from physical illness (primary) From 26 Jan 2023

Professional

9. Select the **Pencil Icon** at the side of the workers involvement to **edit / amend** the information.

Worker relationships - Richard Avila Howard (10456961) born 17 Mar 2013 (9 years old)

Worker Relationships	Telephone	From Date	To Date
Lead Professional : Natalie McMenamin	01302736626	17 Feb 2021	

 10. Insert the **End Date** and using the drop-down list **select an End Reason**.

Amend worker relationship - Richard Avila Howard (10456961) born 17 Mar 2013 (9 years old)

Fields marked with a * are required

Worker *


Relationship type *

From date *

To date

End reason *

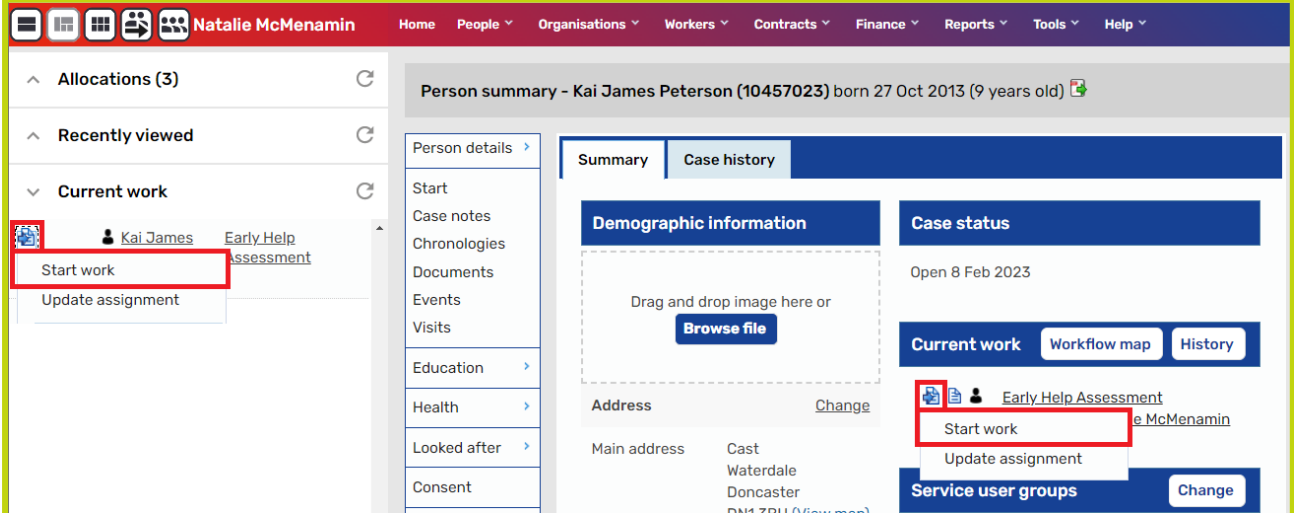
- Case closed to worker
- Case transferred
- Person has died
- Person has moved
- Worker has left

 11. Select **Save** to ensure that the relationship is ended and then Select **Ok** to return to the **Person Summary Page**.



Completing the Early Help Assessment

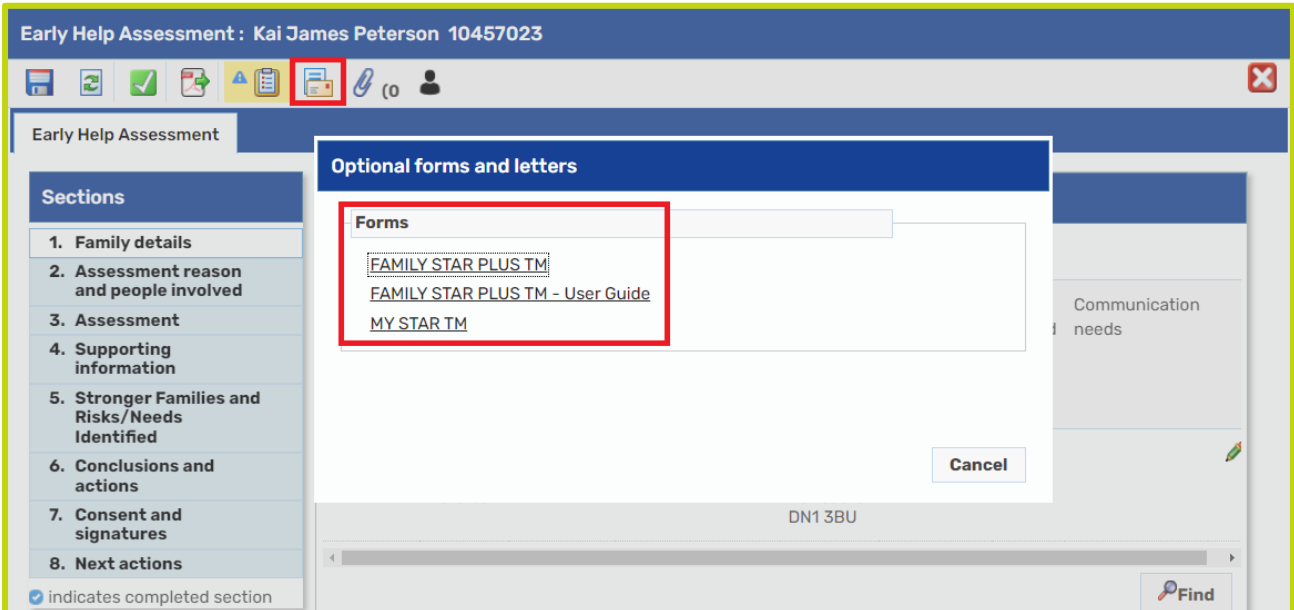
When an Early Help Assessment is allocated to you, it will appear in your current work > incoming work folder as a task called **Early Help Assessment**.

1. Click on the **incoming step icon**  and then click **Start**.

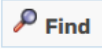
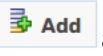


The screenshot shows the user interface for an Early Help Assessment. On the left, under 'Current work', there is a task for 'Kai James Peterson' with a sub-task 'Early Help Assessment'. The 'Start work' button is highlighted with a red box. On the right, the 'Person summary' for Kai James Peterson (10457023) is displayed. The 'Case status' section shows 'Open 8 Feb 2023'. The 'Current work' section also shows the 'Early Help Assessment' task with a 'Start work' button highlighted by a red box.

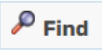
2. To record the Outcomes Star – Select the **optional forms/letters icon**  or use the **paperclip icon**  to **attach** the outcomes star if this has been recorded outside of the system.



The screenshot shows the 'Optional forms and letters' dialog box. The 'Forms' section is highlighted with a red box, listing the following options: 'FAMILY STAR PLUS TM', 'FAMILY STAR PLUS TM - User Guide', and 'MY STAR TM'. The 'Cancel' button is visible at the bottom right of the dialog box.

3. Click on the 2nd Tab – Family Star and work through Sections 1 – 4 using the **Find Icon** , **Add Icon**  and **radio buttons** to populate the information.

4. Go back to the first tab – Early Help Assessment and Plan, under Section 1: Family Details - Ensure that all the family details are **accurate** for all family members as this will help to build the genogram.

Use the **Find Icon**  to **add** in additional family members and significant people and **tick** the **section completed** box once the whole section is finished.

Details of all subject children									
ID	Name	DOB / EDD	Gender	Disability	Address	Ethnicity	Non Looked After Status	Legal Status	Communication needs
10457023	Kai James Peterson	27/10/2013	Male		Cast Waterdale Doncaster DN13BU	Asian/Asian British			

Family members and other significant people									
ID	Name	DOB / EDD	Gender	Parental responsibility	Address	Living in household	Ethnicity	Relationship to the above child(ren)	Communication needs
10457033	Nicola Leanne Peterson	17/01/1990	Female		Cast Waterdale Doncaster DN13BU	<input checked="" type="checkbox"/>	Black/Black British	Mother	

Relevant legal status and immigration status for any family household member or significant people not living in the household

Section completed

Remember that the **pencil icon**  allows you to **edit** and the **bin icon**  allows you to **remove** information.

5. Section 2: Assessment reason and people involved - Use the **Radio Buttons** and **Find Icons** to complete this section ensuring that all the *** mandatory fields are completed**.

Early Help Assessment : Kai James Peterson 10457023

Early Help Assessment FAMILY STAR PLUS TM

Sections

- 1. Family details
- 2. Assessment reason and people involved**
- 3. Assessment
- 4. Supporting information
- 5. Stronger Families and Risks/Needs Identified
- 6. Conclusions and actions
- 7. Consent and signatures
- 8. Next actions

Assessment Date* 08/02/2023

Type of Assessment*

Universal Plus Partnership Response

What has led to this assessment?

Details of person(s) undertaking this assessment

Name	Role	Team / organisation	Telephone number(s)	E-Mail
Natalie McMenamin		Doncaster Borough Council	Work 01302736626	McMenamin

Find

6. Section 3: Assessment – Use the **Text Fields** and **Radio Buttons** to complete this section ensuring that all the *** mandatory fields are completed**.

Early Help Assessment : Kai James Peterson 10457023

Sections

- 1. Family details
- 2. Assessment reason and people involved
- 3. Assessment**
- 4. Supporting information
- 5. Stronger Families and Risks/Needs Identified
- 6. Conclusions and actions
- 7. Consent and signatures
- 8. Next actions

Family history, relationships and well-being Text...

Wider family Text...

Housing, employment and financial considerations Text...

Social and community resources, including education Text...

Case Scale

Kai James Peterson

On a scale of 0 to 10 where 10 means everyone involved is confident the child/young person will be kept safe even when problems happen and the danger is present and Children's Services can close the case and 0 means no one knows how the child/young person will be kept safe when the danger is happening. Where do you rate this situation today?

Case Scale*

0 1 2

3 4 5

6 7 8

9 10

7. Section 4: Supporting Information – Here, you can upload any relevant material as an image. You can do this for the subject child/young person, and any additional person(s).

8. Section 5: Stronger Families and Risks/Needs Identified – These will auto populate from the Contact, Referral or previous EHA.

- 8.1. For the **Stronger Families Outcomes - Family Need** area, you can amend the Yes / No **radio buttons** and subsequent **checkboxes** if necessary.

- 8.2. For the **Risks and Needs Identified** area, you can **add** and **remove ticks** in the **checkboxes** as necessary, remembering to **update** the mandatory drop-down list for the **primary presenting need** if this has changed and then **tick** the Section Completed Box.

Early Help Assessment : Kai James Peterson 10457023

Sections

- 1. Family details
- 2. Assessment reason and people involved
- 3. Assessment
- 4. Supporting information
- 5. Stronger Families and Risks/Needs Identified**
- 6. Conclusions and actions
- 7. Consent and signatures
- 8. Next actions

indicates completed section

ASB (Anti-social behaviour) Behaviour Child criminal exploitation vulnerabilities

Child sexual exploitation vulnerabilities Communication Contact concerns

Education Emotional well-being Family breakdown - request for accommodation

Financial exclusion Harassment Homelessness

Honour based violence Information request Information sharing

No recourse to public fu

Parent / carer

Asylum seeker Worklessness

Other family / household


Asylum seeker Worklessness

Primary Presenting Risk / Need

Kai James Peterson

Primary Presenting Risk/Need* Communication

Section completed

9. Section 6. Conclusions and actions – use the **Add Icon**  **Add** to record the **Agreed Actions**. There are also some **Rich Text fields** to complete with information. **Rich Text fields** mean you can **format the text in the box**, e.g. make text bold, bullet point, etc.

Early Help Assessment : Kai James Peterson 10457023

Sections


- 1. Family details
- 2. Assessment reason and people involved
- 3. Assessment
- 4. Supporting information
- 5. Stronger Families and Risks/Needs Identified
- 6. Conclusions and actions**
- 7. Consent and signatures
- 8. Next actions

indicates completed section

6. Conclusions and actions

Now the assessment is completed you need to record conclusions, solutions and actions. Work with the family and take account of their ideas, solutions and goals.

Agreed Actions

Subjects	Stronger Families Criteria	What needs to be achieved?	What needs to happen?	Who will be responsible?	When does it need to be done?	Update progress
Kai James Peterson	Getting a Good Education	Text...	Text...	Text...	Text...	

Add


What might happen if things don't improve?

Text here...


Bold

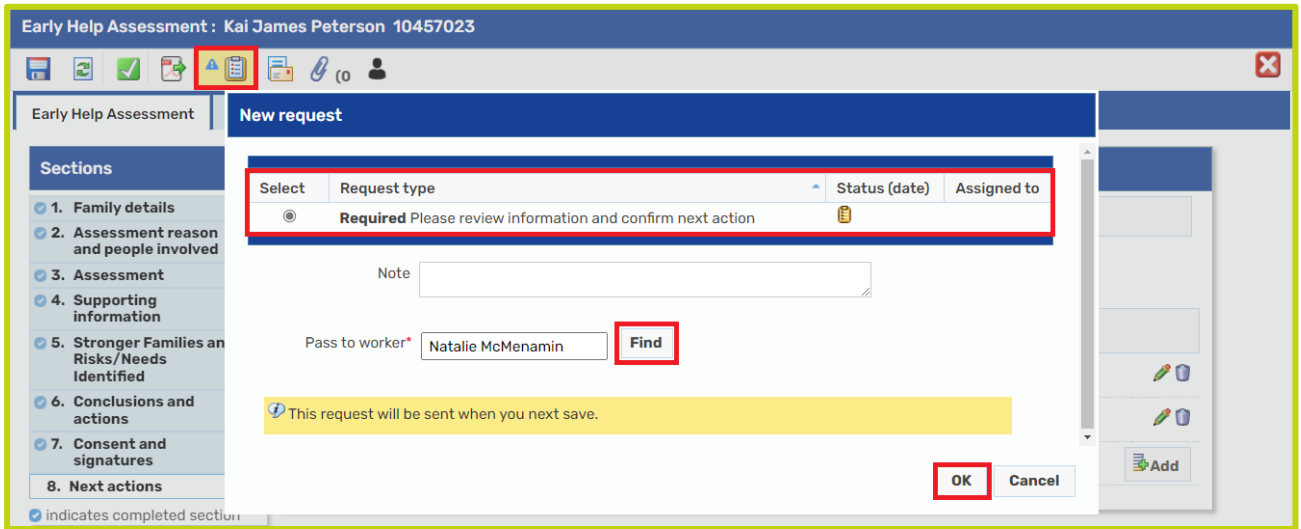
Italic

10. Section 7: Consent and Signatures – **Update** and **amend** as necessary and then **tick** the **Assessor Details** box, before **ticking** the **section completed** box.

11. Under Section 8: Actions Taken – Use the **Add Icon**  to access the drop down box, select the appropriate next action/s. Use the **Find Icon** to assign the task to a co-worker or select **Assign to Me** to assign the task to yourself. Then, click **Add** (to then add another Next Action) or **Add and Close** (to add and close the Next Action pop-up).

*** Ticking the Send Immediately Box allows you to send a task to be started without the current form being finalised***

12. Click on the **Request Clipboard Icon**  to send the request to yourself to **authorise**. **Tick** the radio button next to: Please review information and confirm next action and use the **Find Icon** to search for yourself, and select OK.




Early Help Assessment : Kai James Peterson 10457023

Early Help Assessment | **New request**

Sections


- 1. Family details
- 2. Assessment reason and people involved
- 3. Assessment
- 4. Supporting information
- 5. Stronger Families and Risks/Needs Identified
- 6. Conclusions and actions
- 7. Consent and signatures
- 8. Next actions

Indicates completed sections


Select	Request type	Status (date)	Assigned to
<input checked="" type="radio"/>	Required	Please review information and confirm next action	

Note

Pass to worker* **Find**

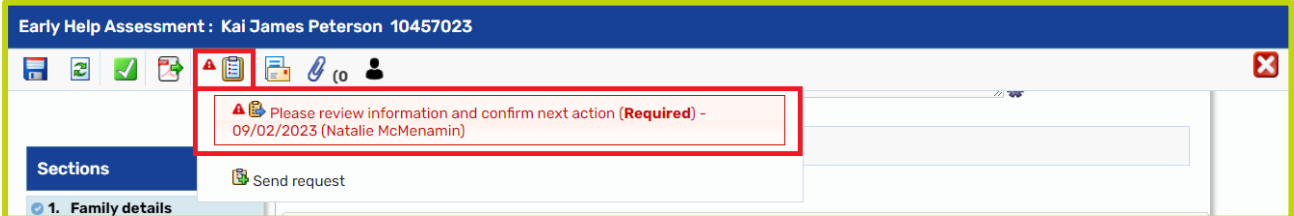
 This request will be sent when you next save.

OK Cancel **Add**


13. **Save**  the form to trigger the request.

Self-Authorising the Early Help Assessment

1. Select the **Request Clipboard Icon**  and select the **Red Highlighted Request**.



Early Help Assessment : Kai James Peterson 10457023

Request Clipboard Icon  **Red Highlighted Request**

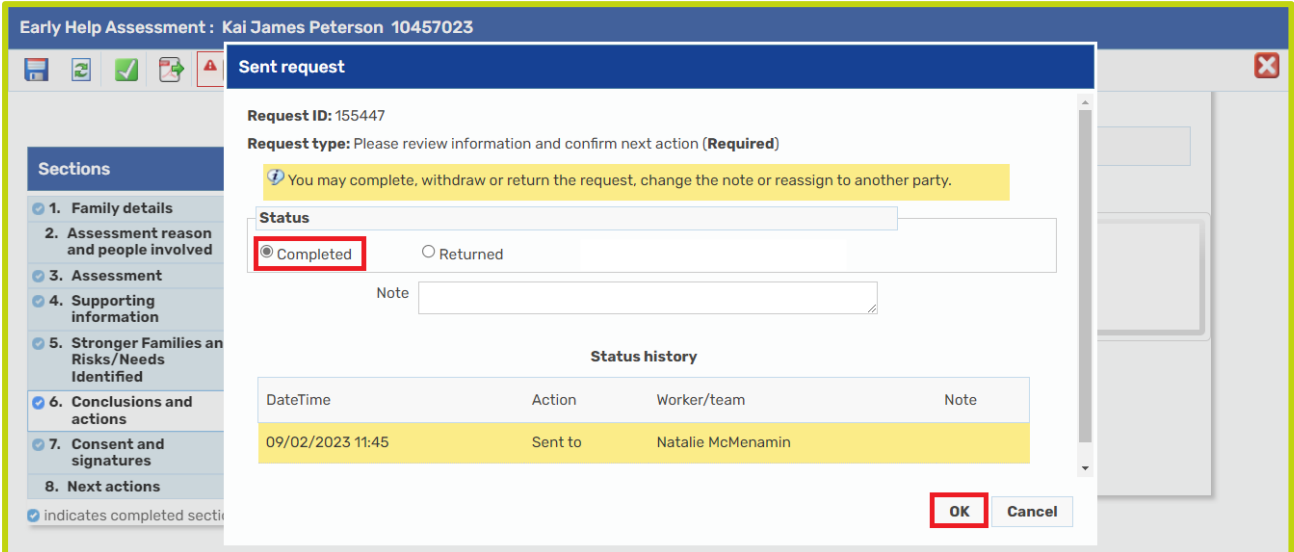
Please review information and confirm next action (**Required**) - 09/02/2023 (Natalie McMenamin)

Sections

- 1. Family details

Send request

2. Select **Completed** and click **OK**.



Early Help Assessment : Kai James Peterson 10457023

Sent request

Request ID: 155447
Request type: Please review information and confirm next action (**Required**)

You may complete, withdraw or return the request, change the note or reassign to another party.

Status

Completed Returned

Note

Status history

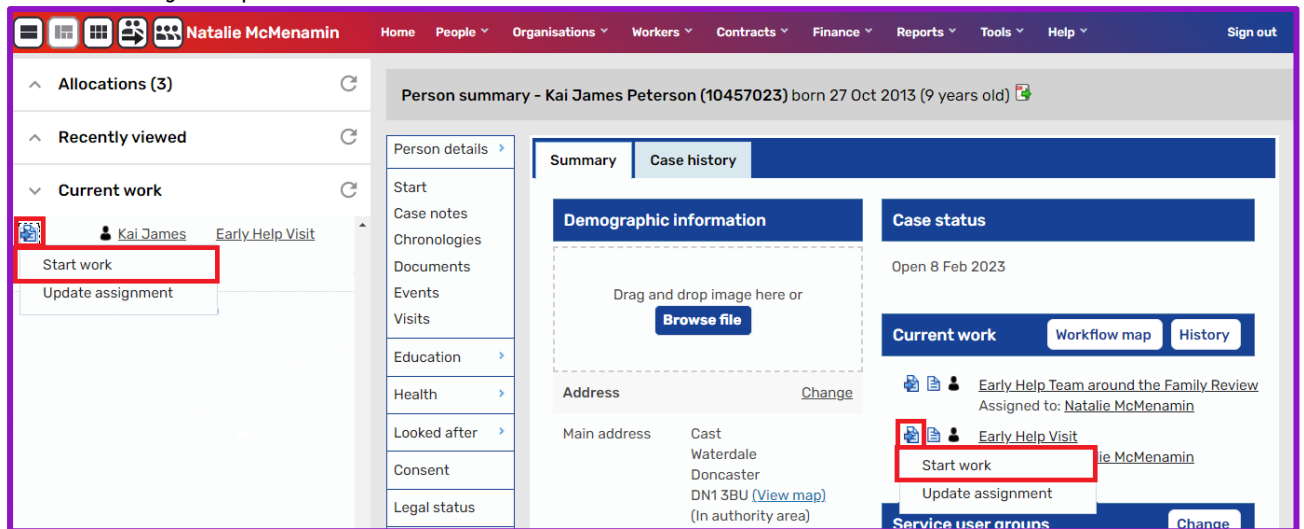
DateTime	Action	Worker/team	Note
09/02/2023 11:45	Sent to	Natalie McMenamin	

OK Cancel

3. Click on the **Green Tick Icon**  to **Finish** the form and trigger the next actions.


Completing the Early Help Visit

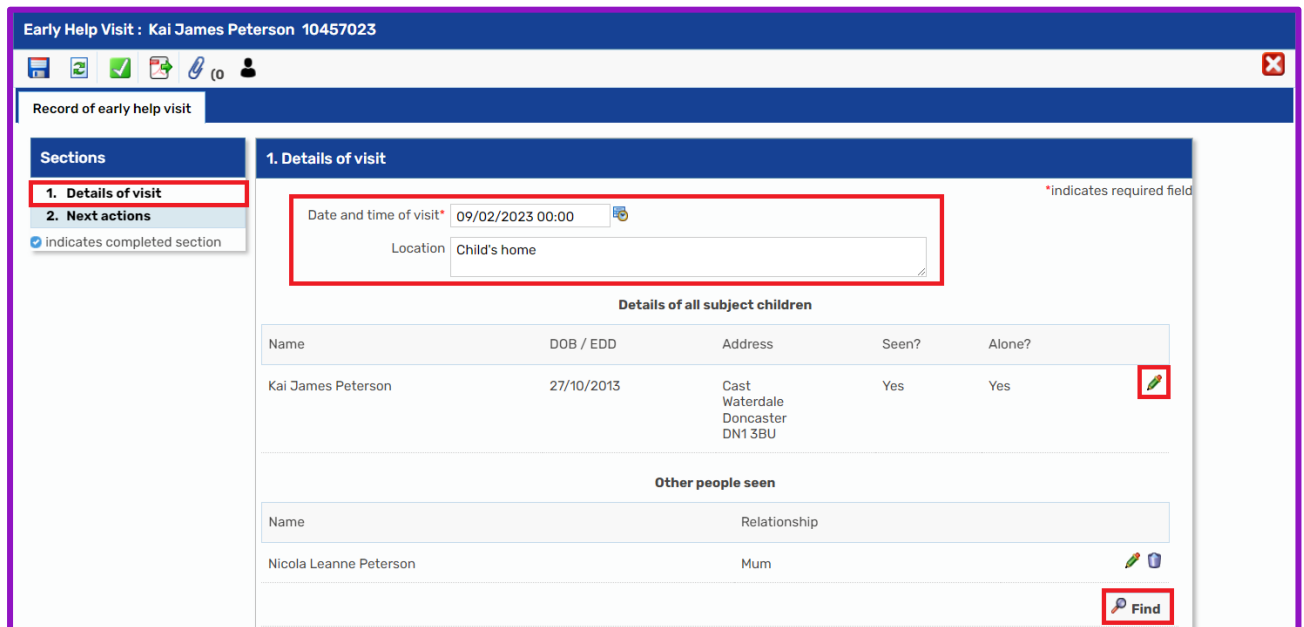
1. From **Current Work > Incoming Work**, select the incoming step icon  to **start** the Early Help Visit.



The screenshot shows the 'Person summary' for Kai James Peterson (10457023) born 27 Oct 2013 (9 years old). The interface includes a navigation menu on the left with options like 'Start', 'Case notes', 'Chronologies', 'Documents', 'Events', 'Visits', 'Education', 'Health', 'Looked after', 'Consent', and 'Legal status'. The main content area is divided into 'Summary' and 'Case history' tabs. Under 'Summary', there is a 'Demographic information' section with a 'Browse file' button and an 'Address' section with a 'Change' button. The 'Case status' section shows 'Open 8 Feb 2023'. The 'Current work' section shows 'Early Help Team around the Family Review' assigned to 'Natalie McMenamin', with 'Start work' and 'Update assignment' options highlighted by a red box.

2. In Section 1: Details of Visit use the **calendar icon** to **insert the date and time** of the visit and **ensure** that the **has the child been seen and seen alone** boxes are **updated** appropriately with the **Edit Icon** .

You can also use the **Find Icon**  to add in **Other people seen** as part of the visit.



The screenshot shows the 'Early Help Visit: Kai James Peterson 10457023' form. The '1. Details of visit' section is highlighted, showing 'Date and time of visit' as 09/02/2023 00:00 and 'Location' as Child's home. The 'Details of all subject children' table shows Kai James Peterson with 'Seen?' and 'Alone?' both checked. The 'Other people seen' section shows Nicola Leanne Peterson as 'Mum'. A red box highlights the 'Date and time of visit' field, the 'Location' field, and the 'Seen?' and 'Alone?' checkboxes. Another red box highlights the 'Edit' icon in the 'Details of all subject children' table. A third red box highlights the 'Find' icon in the 'Other people seen' section.

Name	DOB / EDD	Address	Seen?	Alone?
Kai James Peterson	27/10/2013	Cast Waterdale Doncaster DN1 3BU	Yes	Yes

2.1. Further down in Section 1, make sure you complete the **Observations** and **Summary of Visit** text fields with relevant information, and select the **Visit Completed by** checkbox.

Use the **Question Marks** for additional guidance on what information to include in each section.

Early Help Visit : Kai James Peterson 10457023

Sections

- 1. Details of visit
- 2. Next actions

Observations

Text...

Summary of visit

Text...

Visit completed by

Visit completed by Verified at 02:09PM on 09/02/2023 by Natalie McMenamin Role: Demonstrator, Organisation: Doncaster Borough Council

Section completed

3. In section 2: Actions Taken – Use the **Add Icon** to access the drop-down list and select **Early Help Direct Work**, and click **Assign to Me** (or use the Find Icon to assign the task to a colleague/co-worker) and Click **Add and Close**.

Please note, if needed you can also select a next action of **End Early Help Visits**, which will **terminate the Early Help Visits workflow**.

Early Help Visit : Kai James Peterson 10457023

Record of early help visit

Sections

- 1. Details of visit
- 2. Next actions

Next actions

Select action Next Early Help Visit

Pass to worker Natalie McMenamin Find Clear Assign To Me

Note


Priority

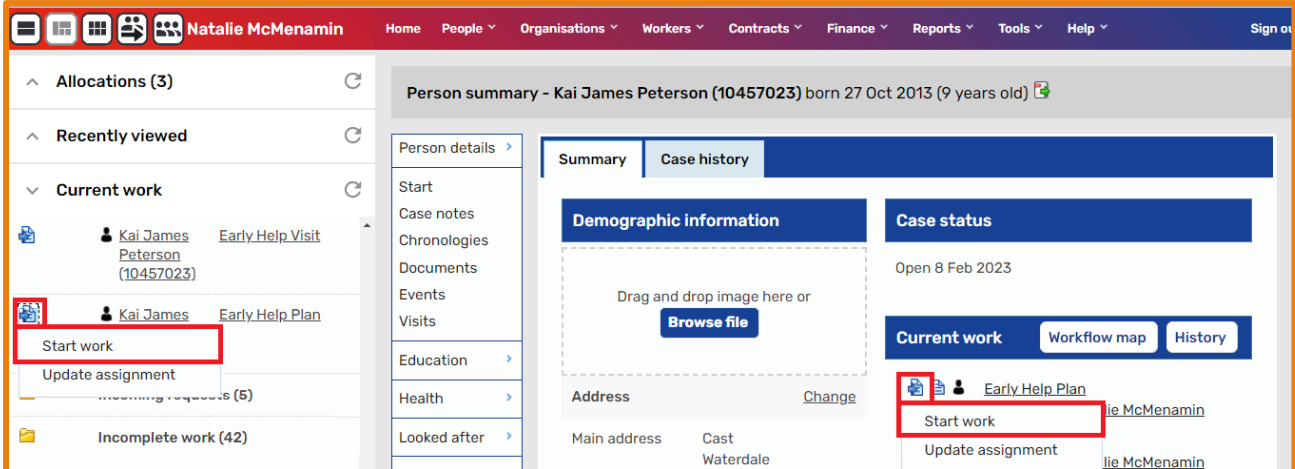
Urgent Normal Low

Add Add and close Close

4. Select the **Green Tick Icon** to **Finish** the form.

Completing the Early Help Plan

1. From **Current Work > Incoming Work**, select the incoming step icon  to **start** the Early Help Plan.



Person summary - Kai James Peterson (10457023) born 27 Oct 2013 (9 years old)

Person details >

- Start
- Case notes
- Chronologies
- Documents
- Events
- Visits
- Education >
- Health >
- Looked after >

Summary | Case history

Demographic information

Drag and drop image here or [Browse file](#)


Case status

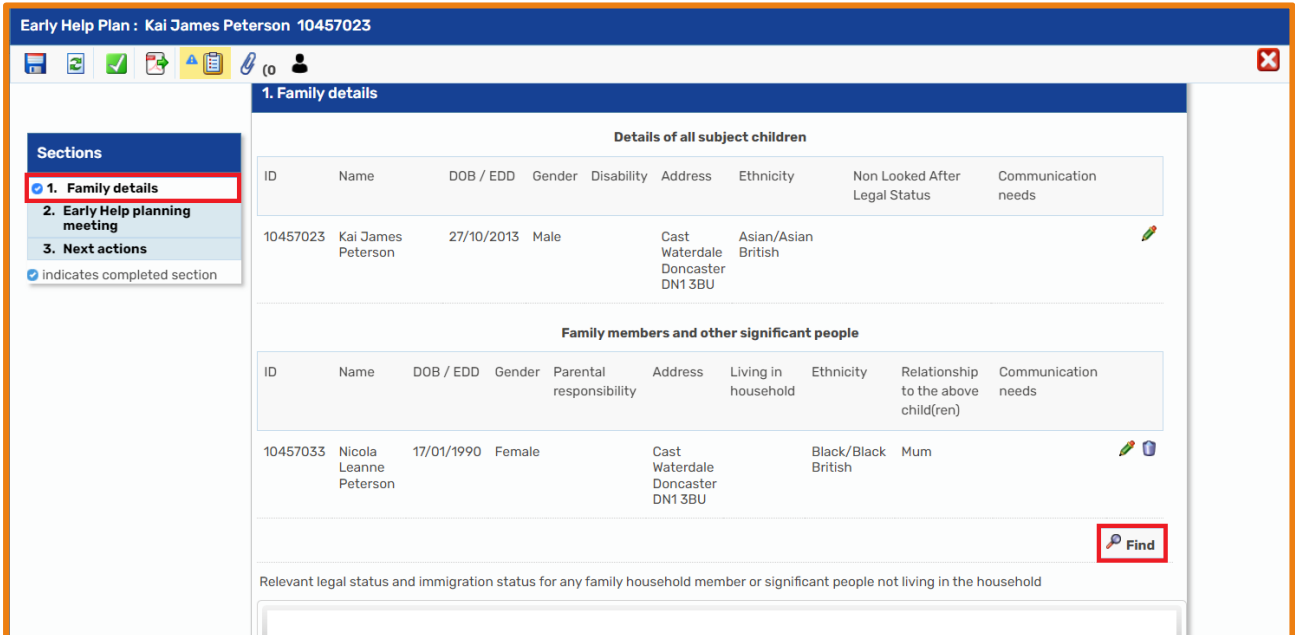
Open 8 Feb 2023

Current work | Workflow map | History

Start work | Update assignment

2. Under Section 1: Family Details - Ensure that all the family details are **accurate** for all family members as this will help to build the genogram.

Use the **Find Icon**  to **add** in additional family members and significant people and **tick** the **section completed** box once the whole section is finished.



Early Help Plan : Kai James Peterson 10457023

Sections

- 1. Family details**
- 2. Early Help planning meeting
- 3. Next actions

Indicates completed section

1. Family details

Details of all subject children

ID	Name	DOB / EDD	Gender	Disability	Address	Ethnicity	Non Looked After Legal Status	Communication needs
10457023	Kai James Peterson	27/10/2013	Male		Cast Waterdale Doncaster DN1 3BU	Asian/Asian British		

Family members and other significant people

ID	Name	DOB / EDD	Gender	Parental responsibility	Address	Living in household	Ethnicity	Relationship to the above child(ren)	Communication needs
10457033	Nicola Leanne Peterson	17/01/1990	Female		Cast Waterdale Doncaster DN1 3BU		Black/Black British	Mum	

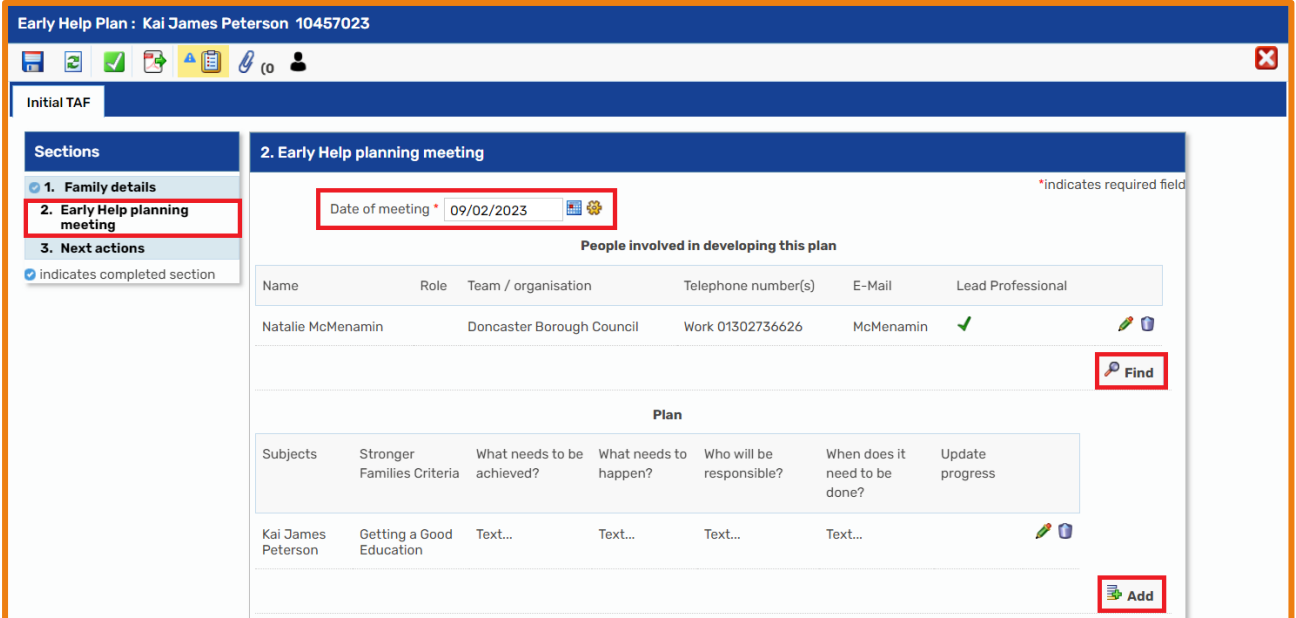
Find

Relevant legal status and immigration status for any family household member or significant people not living in the household

3. In Section 2: Early Help planning meeting – the **Date of the meeting** will auto-populate as today's date, but can be changed.

Then, use the **Find Icon**  to add **People involved in developing this plan**.

You can also use the **Add Icon**  to add to the **Plan** table.



Early Help Plan : Kai James Peterson 10457023

Initial TAF

Sections

- 1. Family details
- 2. Early Help planning meeting
- 3. Next actions

indicates completed section

2. Early Help planning meeting

Date of meeting * 09/02/2023

People involved in developing this plan

Name	Role	Team / organisation	Telephone number(s)	E-Mail	Lead Professional
Natalie McMenamin		Doncaster Borough Council	Work 01302736626	McMenamin	<input checked="" type="checkbox"/>

Find

Plan

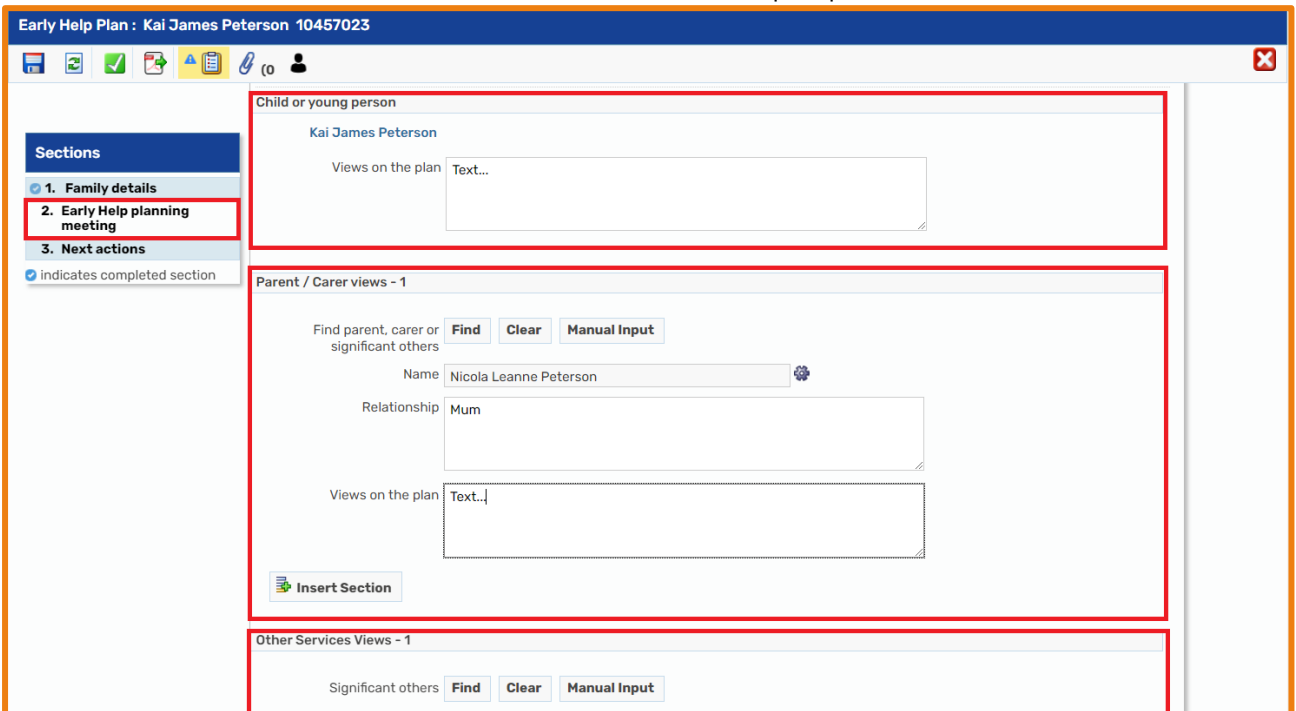
Subjects	Stronger Families Criteria	What needs to be achieved?	What needs to happen?	Who will be responsible?	When does it need to be done?	Update progress
Kai James Peterson	Getting a Good Education	Text...	Text...	Text...	Text...	<input type="checkbox"/>

Add

Remember that the **pencil icon**  allows you to **edit** and the **bin icon**  allows you to **remove** information

3.1. Next in Section 2, you can fill in the **Views of the child/young person**, **Parent/Carer views** and **Other Services Views**.

You can use the **Insert Section** icon to add more people to each area.



Early Help Plan : Kai James Peterson 10457023

Sections

- 1. Family details
- 2. Early Help planning meeting
- 3. Next actions

indicates completed section

Child or young person

Kai James Peterson

Views on the plan Text...

Parent / Carer views - 1

Find parent, carer or significant others Find Clear Manual Input

Name Nicola Leanne Peterson

Relationship Mum

Views on the plan Text..|

Insert Section

Other Services Views - 1

Significant others Find Clear Manual Input

3.2. Then, you can update the **Case Scale and Reason**. You can also select whether a referral to Social Care is needed or not.


The **Arrangements for Review** can also be completed with a **date/time** and

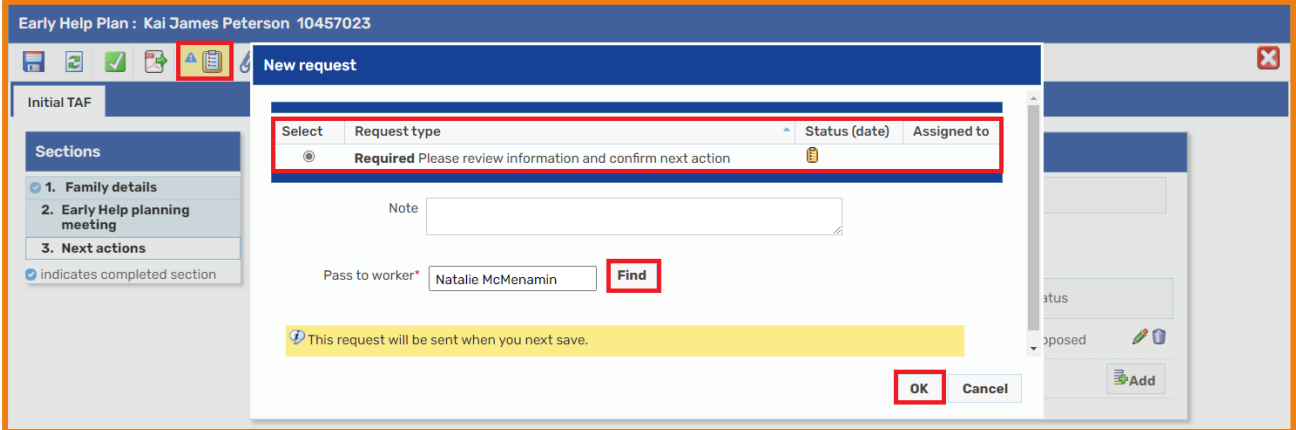
location. Use the **Calendar Icon** to set the date and time, and either **Find** or **Manual Input** to choose the location.

The screenshot shows the 'Early Help Plan' interface for Kai James Peterson (ID: 10457023). The left sidebar lists sections: 1. Family details, 2. Early Help planning meeting (highlighted with a red box), and 3. Next actions. The main content area shows the 'Case Scale' section with a scale from 0 to 10, where 5 is selected. Below this is a 'Case Scale Reason' field with the text 'Updated Info...'. The 'Is a referral to social care needed?' section has 'No' selected. The 'Arrangements for review' section shows a date and time of '23/02/2023 11:00', a 'Find venue' button, and a 'Venue' field containing 'Online'.

4. Under Section 3: Actions Taken – Use the **Add Icon** to access the drop down box, select the appropriate next action/s. Use the **Find Icon** to assign the task to a co-worker or select **Assign to Me** to assign the task to yourself. Then, click **Add** (to then add another Next Action) or **Add and Close** (to add and close the Next Action pop-up).

The screenshot shows the 'Early Help Plan' interface for Kai James Peterson (ID: 10457023) with the 'Next actions' section active. The left sidebar shows section 3. Next actions highlighted with a red box. The main content area shows a 'Select action' dropdown menu with 'Early Help Team around the Family Review' selected. Below this is a 'Pass to worker' field with 'Natalie McMenamin' and buttons for 'Find', 'Clear', and 'Assign To Me'. A 'Note' field is empty. The 'Priority' section has 'Normal' selected. At the bottom, there are buttons for 'Add', 'Add and close', and 'Close'.

5. Click on the **Request Clipboard Icon**  to send the request to yourself to **authorise**. **Tick** the radio button next to: Please review information and confirm next action and use the **Find Icon** to search for yourself, and select OK.



Early Help Plan : Kai James Peterson 10457023

Initial TAF

Sections

- 1. Family details
- 2. Early Help planning meeting
- 3. Next actions

indicates completed section

New request


Select	Request type	Status (date)	Assigned to
<input checked="" type="radio"/>	Required Please review information and confirm next action		

Note

Pass to worker* Natalie McMenamin **Find**

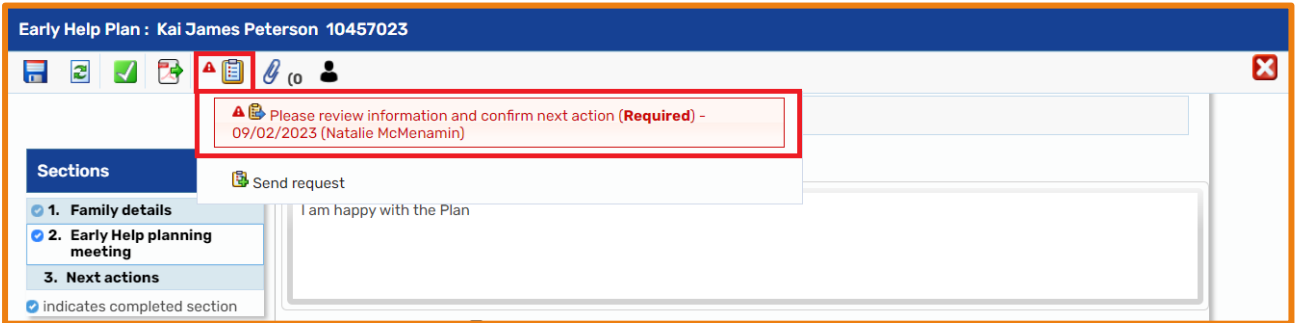
This request will be sent when you next save.

OK Cancel **Add**

6. **Save**  the form to trigger the request.

Self-Authorising the Early Help Plan

1. Select the **Request Clipboard Icon**  and select the **Red Highlighted Request**.



Early Help Plan : Kai James Peterson 10457023

Sections

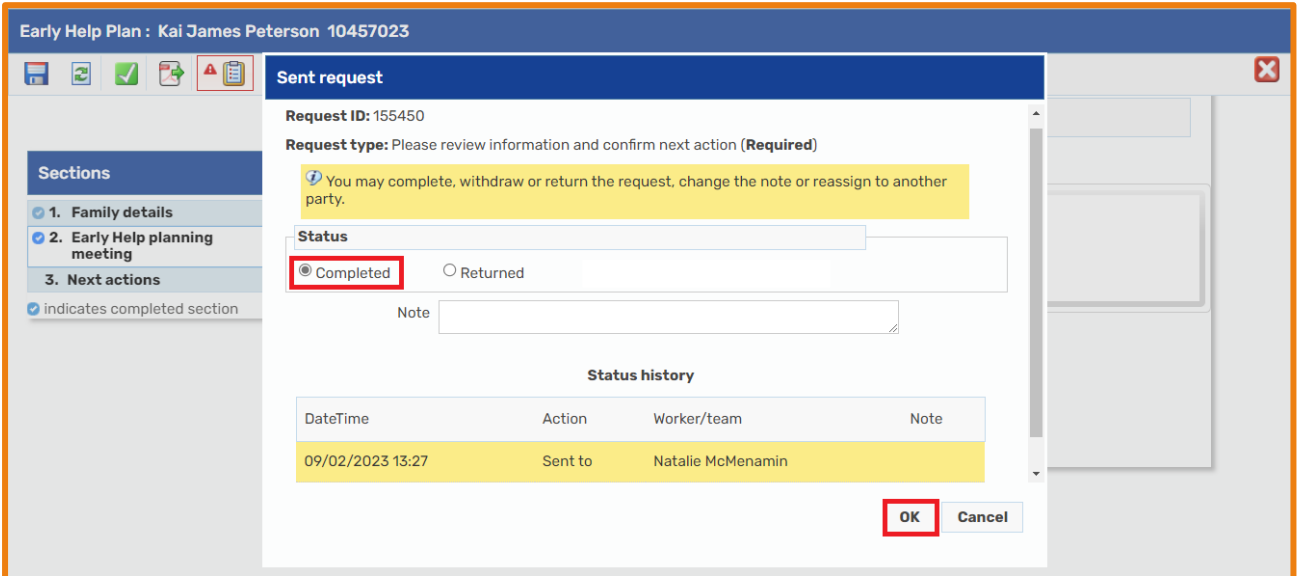
- 1. Family details
- 2. Early Help planning meeting
- 3. Next actions

Send request

I am happy with the Plan

Please review information and confirm next action (Required) - 09/02/2023 (Natalie McMenamin)

2. To **approve** the Early Help Plan, select **Completed** and click **OK**.



Early Help Plan : Kai James Peterson 10457023

Sent request

Request ID: 155450

Request type: Please review information and confirm next action (Required)

You may complete, withdraw or return the request, change the note or reassign to another party.

Status

Completed Returned

Note

Status history

DateTime	Action	Worker/team	Note
09/02/2023 13:27	Sent to	Natalie McMenamin	



OK Cancel

3. Click on the **Green Tick Icon**  to **Finish** the form and trigger the next actions.

Completing the Early Help Team around the Family Review

The Early Help Review Team around the Family Review will sit in the Future Work Folder until 14 days prior to the set scheduled date, it will then transfer into the Incoming Work Folder. Reviews can be started earlier from the Future Work Folder if necessary.


1. From the Current Work Folder > Incoming Work or Future Work select the icon to start the work.

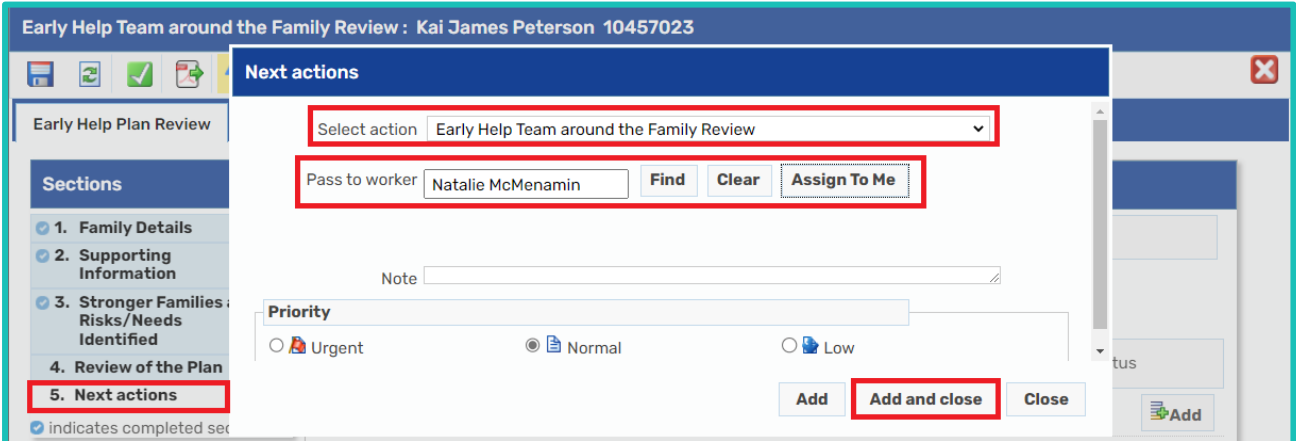
2. Select the **optional forms/letters icon**  to record the **Outcomes Star** or use the **paperclip icon**  to **attach** the outcomes star if this has been recorded outside of the system.


3. Answers will auto-populate from the previous Early Help Plan, work through Sections 1 – 4 updating the information and ensuring that any *** mandatory information** fields are completed. **Tick** the section completed box after completing each section.

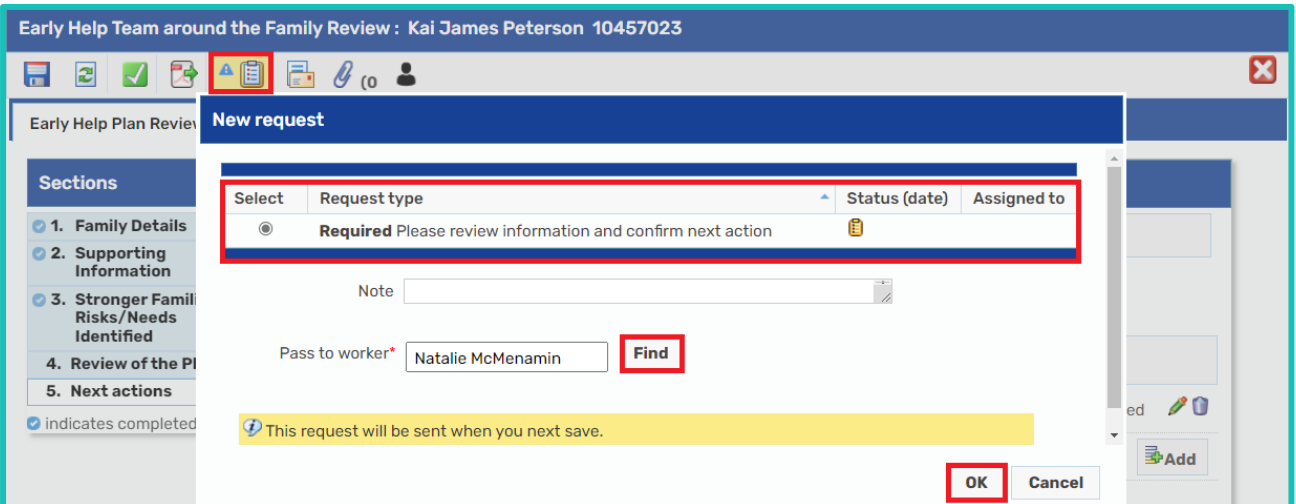
Remember that the **pencil icon**  allows you to **edit** and the **bin icon**  allows you to **remove** information.

Refer to the section above – [Completing the Early Help Plan](#) for further details and support on completing this form.


4. Under Section 5: Actions Taken – Use the **Add Icon**  to access the drop down box, select the appropriate next action/s. Use the **Find Icon** to assign the task to a co-worker or select **Assign to Me** to assign the task to yourself. Then, click **Add and Close**.



5. Click on the **Request Clipboard Icon**  to send the request to yourself to **authorise**. Tick the radio button next to: Please review information and confirm next action and use the **Find Icon** to search for yourself, and select OK.

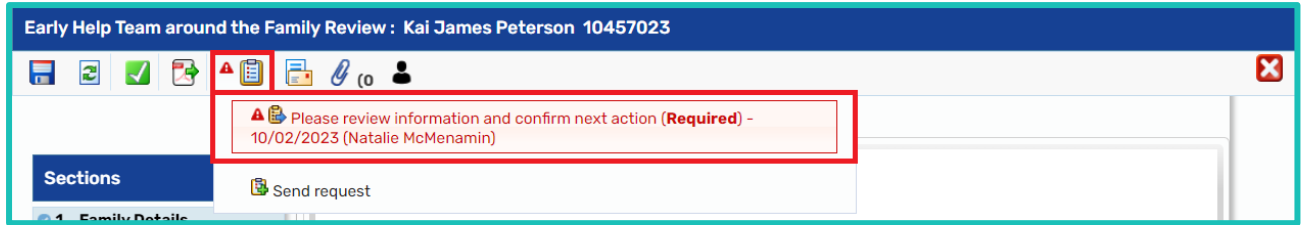


Select	Request type	Status (date)	Assigned to
<input checked="" type="radio"/>	Required Please review information and confirm next action		

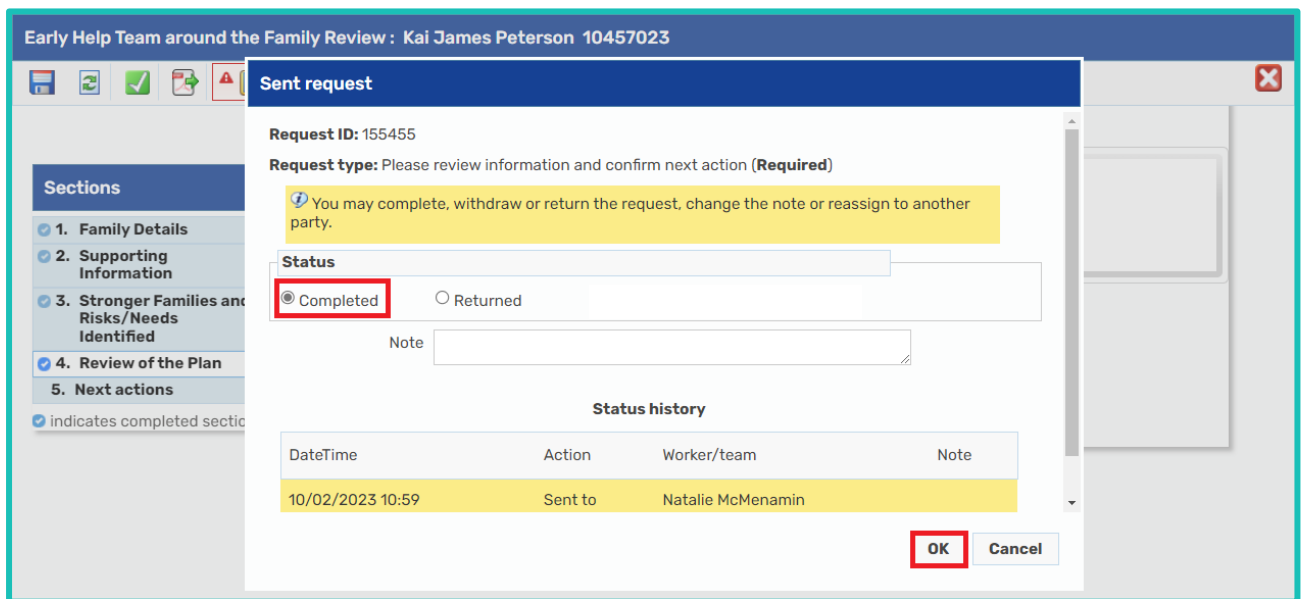
6. **Save**  the form to trigger the request.


Self-Authourising the Early Help Review Team around the Family Review

1. Select the **Request Clipboard Icon**  and select the **Red Highlighted Request**.



2. To **approve** the Early Help Team around the Family Review, select **Completed** and click **OK**.



3. Select on the **Green Tick Icon**  to **Finish** the form and trigger the next actions.

Early Help Case Closure

1. Under **Current Work > Incoming Work** select the **incoming step icon** to **start** the Early Help Case Closure Record.

The screenshot shows the system interface for Natalie McMenemy. On the left, the 'Current work' menu is expanded, and the 'Start work' option for 'Early Help - Case Closure' is highlighted with a red box. The main area displays the 'Person summary' for Kai James Peterson (10457023), born 27 Oct 2013 (9 years old). The 'Case history' tab is active, showing 'Demographic information' and 'Case status' (Open 8 Feb 2023). The 'Current work' section at the bottom right shows the 'Start work' option for 'Early Help - Case Closure' highlighted with a red box.

2. Section 1: Closure Details – Complete the form ensuring that all the **mandatory fields *** are completed.

3. Use the **calendar icon** to insert the **case closure date**, (the yellow cog has populated with the date the form was started but this is editable).

The screenshot shows the 'Early Help - Case Closure' form for Kai James Peterson (10457023). The 'Sections' panel on the left has '1. Closure details' highlighted with a red box. The form fields are: 'Case closure date*' (10/02/2023) with a calendar icon and a yellow cog icon highlighted with a red box; 'Case closure reason*' (-- Please Select --); 'Level of Need at Closure*' (-- Please Select --); and 'Reason for early help involvement'.

4. The **drop-down list** to select a **Case closure reason** and **Level of Need at Closure**.

The screenshot shows the 'Early Help - Case Closure' form for Kai James Peterson (10457023). The 'Sections' panel on the left has '1. Closure details' highlighted with a red box. The form fields are: 'Case closure date*' (10/02/2023) with a calendar icon and a yellow cog icon highlighted with a red box; 'Case closure reason*' (All outcomes met) with a dropdown arrow highlighted with a red box; 'Level of Need at Closure*' (Level 1) with a dropdown arrow highlighted with a red box; and 'Reason for early help involvement'.

5. Use the **free type text fields** to **record** the reason for early help involvement and summary of interventions.

Early Help - Case Closure : Kai James Peterson 10457023

Case closure date* 10/02/2023

Case closure reason* All outcomes met

Level of Need at Closure* Level 1

Reason for early help involvement

Summary of interventions

6. Ensure that any **outstanding steps / services or open plans** are completed/cancelled.

Early Help - Case Closure : Kai James Peterson 10457023

Outstanding Steps / Services or Open CP Plan

Open or incoming steps

ID	Title	Start date	Assigned to worker	Assigned to team
561404675	Early Help Visit		Natalie McMenamin	

Outstanding Services

Service	Start date	Status

7. To request **Open or incoming steps** are cancelled, select the Requests Icon. Then, send the 'Please cancel Direct Work no longer required' request to the DIPS Support Team Virtual Worker.

Early Help - Case Closure : Kai James Peterson 10457023

New request

Select	Request type	Status (date)	Assigned to
<input type="radio"/>	Required Please review information and confirm next action		
<input checked="" type="radio"/>	Please cancel Direct Work no longer required		


Note

Pass to worker* DIPS Support Team Virtual Worker



This request will be sent when you next save.

OK Cancel

*****Please note**, the '**Required: Please review information and confirm next action**' request **must be complete by a manager** before the DIPS Team can cancel any work***

8. In the Stronger Families Outcomes area, use the **add icon**  to insert achievements/outcomes.

9. The same applies to insert Scale Rating Information.

Remember that the **pencil icon**  allows you to **edit** and the **bin icon**  allows you to **remove** information.

10. The File Retention Details are recorded via the Person Summary Page, ensure that you have saved the closure form and then from the Person Summary Page select **File Management > File Retention**.

11. Complete the File Retention Information, ensuring that all the *** mandatory fields** are populated and then select **Save**.

File retention data - Kai James Peterson (10457023) born 27 Oct 2013 (9 years old)

Fields marked with a * are required

File retention criteria * All other records

File retention rule File to be retained for 6 years from case closure date


Instructions:
You will be required to enter the retention start date.
The system will calculate the retain until date.

Retention start date * 10/02/2023

Retain until date * 10/02/2029

Notes

Save Cancel

12. Go back to the Early Help Closure form and select the **Refresh Icon** , this will then insert the File Retention Information.

Early Help - Case Closure : Kai James Peterson 10457023

The File retention details (below) are automatically populated from the information recorded within the File Management menu option on the Person Summary screen which will need to be completed prior to the completion of the step.

File Retention Details

File Retention Criteria* All other records

File Retention Rule* File to be retained for 6 years from case closure date

Retain Until Date* 10/02/2029

Completed by

Supervisor's authorisation

Section completed

13. Tick the Completed By Box, leaving the Supervisor's Authorisation Box unticked.

Early Help - Case Closure : Kai James Peterson 10457023

Retain Until Date* 10/02/2029

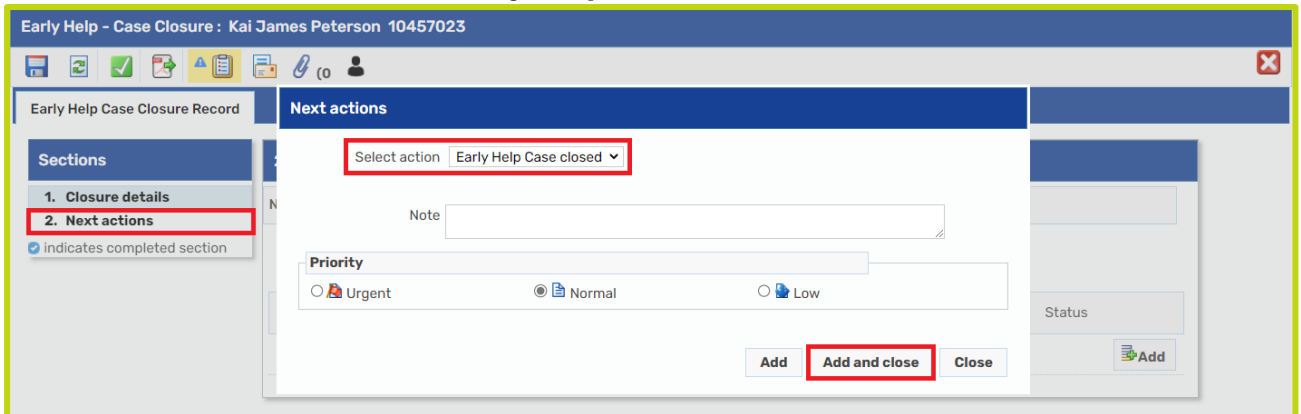
Completed by

Completed by Verified at 11:55AM on 10/02/2023 by Natalie McMenamin Role: Demonstrator, Organisation: Doncaster Borough Council

Supervisor's authorisation

Section completed

14. Section 2: Actions Taken – Use the **Add Icon**  to access the drop-down list and **select** the next action: **Early Help Case Closed**. Select **Add and Close**.



Early Help - Case Closure : Kai James Peterson 10457023

Early Help Case Closure Record

Sections

- Closure details
- Next actions**

indicates completed section

Next actions


Select action Early Help Case closed

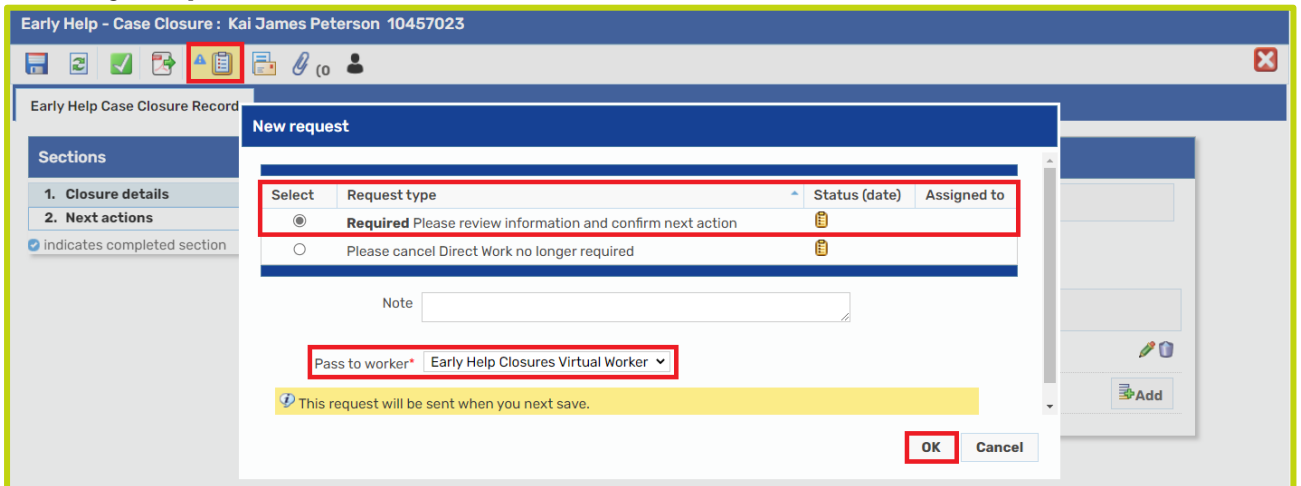
Note

Priority

Urgent Normal Low

Add Add and close Close

15. Select the **Request Clipboard Icon**  and **tick** the request: Please review information and confirm next action. Then, use the **drop-down list** to select the **Early Help Closures Virtual Worker**. Select **OK**.



Early Help - Case Closure : Kai James Peterson 10457023

Early Help Case Closure Record

Sections

- Closure details
- Next actions**

indicates completed section

New request



Select	Request type	Status (date)	Assigned to
<input checked="" type="radio"/>	Required Please review information and confirm next action		
<input type="radio"/>	Please cancel Direct Work no longer required		

Note

Pass to worker* Early Help Closures Virtual Worker

This request will be sent when you next save.

OK Cancel

16. **Save**  and **Exit**  the form to allow an Early Help Hub Team Manager to access, approve and finalise the request.