[**www.surreycc.gov.uk**](http://www.surreycc.gov.uk/)



**Allocation to First Appointment Check list:**

|  |  |  |
| --- | --- | --- |
| **No** | **Action** | **Completed Y/N** |
| **1** | Accept the Gatekeeping meeting invite from your TM for the 15 day time period. (If one not sent to you then talk to your TM to book this in). |  |
| **2** | If there is anything such as annual leave planned or training etc that is going to throw out the timescales on the EHA completion have conversation with your line manager so they can put a MO on to show what the new completion date should be instead. |  |
| **3** | Go onto EHM & read; the referral contact details (Go to the pathway tab, click on the Contact box at the top of the pathway – click on the Contact Record to open this up) read up on any additional information, any forms, Look through the history tab to see if the case has been opened before.  **START MAKING NOTES ON ANY SIGNIFICANT EVENTS/THINGS THAT HAVE HAPPENED FOR THE CHRONOLOGY** |  |
| **4** | Go onto LCS, look to see if the young person has had any involvement with children’s services before; look at the relationships tab to check if there any additional family members that are not on EHM that could be part of the family network, read the case summary, read the chronology, read the last C&F assessment and Plan (CIN or CP), look for any patterns of situations around family breakdown, missing episodes and what were the triggers, what happened, who supported and was called on from the family network. Go onto Wisdom and look under Family Group Conference and check to see if a FGC has been done previously for the family, if so read up on the outcome of this to help identify the families support network.  Go onto Careervision and check for any previous involvement with the criminal justice service and any offending history and assessment of risk of offending and risk of serious harm.  **CONTINUE MAKING NOTES OF ANY SIGNIFICANT EVENTS/THINGS THAT HAVE HAPPENED** |  |
| **5** | **(NEEDS TO BE DONE WITHIN 2 WORKING DAYS OF ALLOCATION TO YOU)**  Call the referrer to talk through the information they have provided, let them know your role and that you will be booking in to see the family & once you have met with the family you will be looking to call a TAF and will invite them to attend. |  |
| **6** | **(NEEDS TO BE DONE WITHIN 2 WORKING DAYS OF ALLOCATION TO YOU)**  Follow the engagement process to establish contact with the family and young person.  Call the family (the details of the parent who consented will be in EHM on the referral or in the contact details) explain who you are and what TYS is, why you are calling (that you have received a referral for their child etc) & that you would like to come and meet with them and their child. Explain about TAF meetings and ask them who they think should be there and are they ok for you to contact them to invite them along? This way you are gaining consent from them to talk to the other services/organisations about their child and the referral.  Book in the initial home visit appointment – **NEEDS TO BE WITHIN 5 WORKING DAYS OF ALLOCATION TO YOU** |  |
| **7** | Call all other organisations/ services who are involved with the young person to explain that you will be working with the family and that you have received a referral around xyz & ask them if they have any observations, concerns, issues they would like to raise. Explain that you will be meeting with the family & child in the coming days and that you will be calling a TAF meeting soon and will be inviting them to attend. Identify which organisation has the best relationship with the young person and their family and look to see if the TAF can be held on their site. |  |
| **8** | Attend initial appointment with the family; re introduce yourself, your role and what the TYS does, be very clear about our role of facilitation and not doing for.  Go over the referral with them and gain the parents & young person’s views separately on their current situation and what they feel their priority needs are at this time.  Start laying the ground work for exploring with them where they would like to get in addressing these priority needs and what barriers they currently have to reaching these goals.  Set up follow up appointment within a week with the young person on their own to continue with the assessment process. |  |
| **9** | Add all of the contact details of any professionals involved and other services and any details of anyone in the wider network of support to the case summary. Name, contact number, email address and role and relationship to the family and young person. |  |

Template last reviewed: February 2024

Reviewed by: Jan Smith

Next review date: October 2024