

EHM Guide to completing Early Help Assessments.

This guide advises how to complete, authorise and review Early Help Assessments and should be used by practitioners and managers to enable them to complete the assessment tasks.

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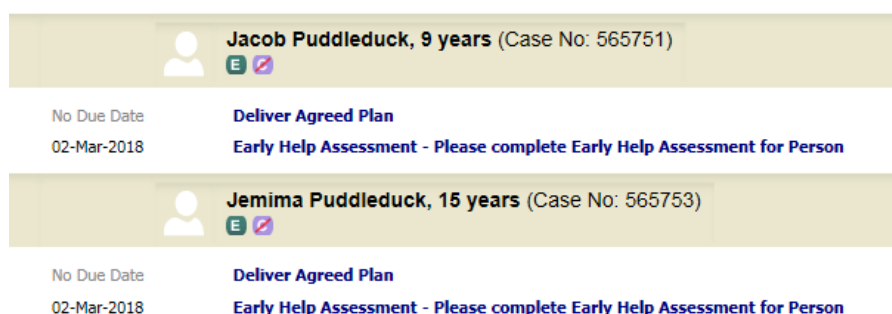
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Early Help Assessment Completion (Practitioner Tasks)

An Early Help Assessment does not need to be completed where there is a current Child and Family (C&F) assessment or for substance misuse YRIs where the 5 step assessment can be used and attached to EHM. For these assessment types please use the How to Attach an Assessment to EHM guide. The following guide describes how to complete an assessment in the early help system.

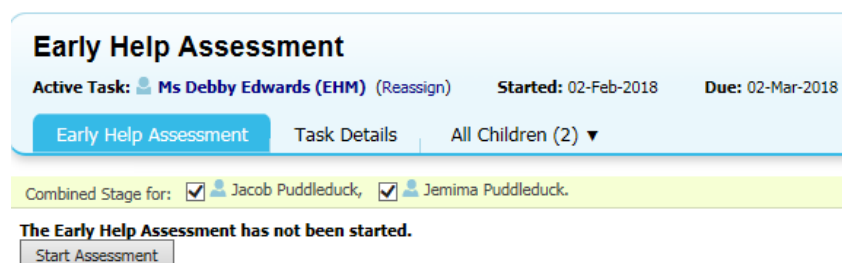
Initial Early Help Assessment

1. Select the [Early Help Assessment – Please complete Early Help Assessment for Person](#) task in your tray (please note that this task does not appear until the consent part of the early help pathway has been completed). Where you have consolidated siblings you only need to select and complete the task once.



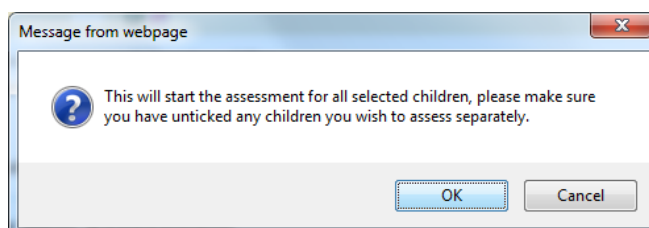
The screenshot shows two task entries in a tray. Each entry is for a child named Puddleduck. The first entry is for Jacob Puddleduck, 9 years old (Case No: 565751). The second entry is for Jemima Puddleduck, 15 years old (Case No: 565753). Both entries show 'No Due Date' and '02-Mar-2018'. The task name is 'Deliver Agreed Plan' and the description is 'Early Help Assessment - Please complete Early Help Assessment for Person'. There are icons for 'E' and a checkmark with a slash.

2. Select Start Assessment.



The screenshot shows the 'Early Help Assessment' task details page. The title is 'Early Help Assessment'. The active task is assigned to 'Ms Debby Edwards (EHM) (Reassign)'. The task started on '02-Feb-2018' and is due on '02-Mar-2018'. There are tabs for 'Early Help Assessment', 'Task Details', and 'All Children (2)'. Below the tabs, there is a section for 'Combined Stage for:' with checkboxes for 'Jacob Puddleduck' and 'Jemima Puddleduck', both of which are checked. A warning message states 'The Early Help Assessment has not been started.' and there is a 'Start Assessment' button.

3. You can see from the above that this is a combined assessment for Jacob and Jemima and the no. of children grouped in this record is (2). If this information is incorrect please refer to ungrouping children prior to starting the assessment. A warning message will appear when you click start assessment – click cancel if you wish to ungroup or OK if you wish to proceed.



Agreeing Contributions

- The next step is to advise the system that you are the person contributing to the assessment. Unfortunately this functionality is currently embedded in the system and we have to complete this step to continue. (We will look at simplifying or removing this stage in future developments). Click the [Click here to select a user, department or group...](#) link.

Early Help Assessment
Active Task: Ms Debby Edwards (EHM) (Reassign) Started: 02-Feb-2018 Due: 02-Mar-2018

Early Help Assessment Task Details All Children (2) ▼

Combined Stage for: Jacob Puddleduck, Jemima Puddleduck.

Now that an Early Help Assessment has begun, you must **select a user, department or group** who will contribute. Selecting a group, the task will be shown to all members of the group, but only members with appropriate access level.

- Create a new CAF Assessment Contribution

[Click here to select a user, department or group...](#)

- Draft CAF Assessment Contributions

No assessment contributions have been started.

▶ Cancel Contributions Step

- Select your name from the address book and click Confirm

Address Book Previous Bookmark Cancel

★ My Contacts

- 👤 All Professionals
- 📁 All Departments
- 👥 All Groups

🏠 Manager Contacts

- 👤 Ms Debby Edwards (EHM) (Yourself) Surrey Family Services (EHM)

★ Bookmarked Contacts

- 👤 Ms Debby Edwards (EHM) Surrey Family Services (EHM)
- 👤 Mark Wedden (EHM) SFS Runnymede Families Team

- You will be presented with the following screen. Please note that it is critical that you include all young people that are consolidated for this record – otherwise the assessments will need to be completed separately. Please therefore make sure that you always tick **all** check boxes to include **all** young people consolidated in the record.

Early Help Assessment
Active Task: Ms Debby Edwards (EHM) (Reassign) Started: 02-Feb-2018 Due: 02-Mar-2018

Early Help Assessment Task Details All Children (2) ▼

Combined Stage for: Jacob Puddleduck, Jemima Puddleduck.

Now that an Early Help Assessment has begun, you must **select a user, department or group** who will contribute. Selecting a group, the task will be shown to all members of the group, but only members with appropriate access level.

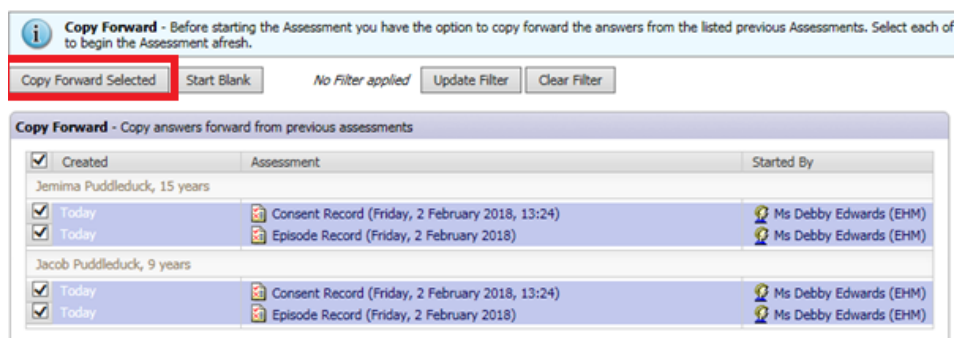
- Create a new CAF Assessment Contribution

Ms Debby Edwards (EHM) X

- Include Jacob Puddleduck in CAF Assessment Contribution for Ms Debby Edwards (EHM)
- Include Jemima Puddleduck in CAF Assessment Contribution for Ms Debby Edwards (EHM)

Start new CAF Assessment Contribution for selected children for Ms Debby Edwards (EHM) - Start

- Once you have ticked the check box for each young person click the Start button. The following screen will appear. Click Copy Forward – this will pull through information into the assessment.



- Select **Early Help Assessment needs to be completed** and complete the details of the person completing the assessment. The source type will pull through from the original episode but can be amended if necessary.

Assessment

Date Assessment Started:

Type of Assessment

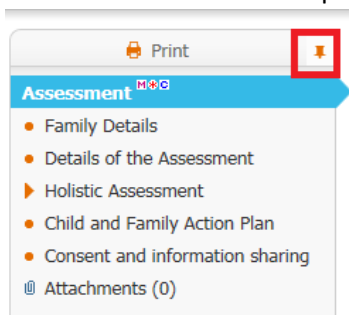
Please select relevant Assessment

Early Help Assessment needs to be completed Other Type of Assessment has already been completed

Details of person who has or will be completing the Assessment

Name	<input type="text" value="Jimmy Worker"/>
Source Type	<input type="text" value="Surrey Family Services"/>
Profession/Job Role	<input type="text" value="Family Worker"/>
Contact Details	<input type="text" value="Contact Details"/>
Contact Email	<input type="text" value="Contact Email"/>

- Complete each section of the Assessment by selecting the section headings on the left hand side. Please note that the pin symbol expands/contracts the left column.






- Please note that when completing the holistic assessment or plan clicking the green cross will add extra rows to the table. The red cross will remove rows. Please do not enter all information into one row but instead create separate rows (please note that the issue where

the text cuts off half way across the column has been raised with the self-service desk and will hopefully be resolved soon).


Holistic Assessment

● **Family and Environmental Factors**

Family History, functioning and well-being, wider family, social relationship and community resources, Housing, Significant events

What are you worried about? <small>Past concerns or future issues, complicating factors</small>	What's working well? <small>Existing support (B Z U • A A A X)</small>	What needs to happen? <small>For future well-being</small>	
			
			
			



Family Working (recording separate answers for each family member)

11. To record separate answers for each sibling please use the  family working icon found on the right hand side of each box within the assessment

12. Clicking on this box will place the sibling's names above the box.

● **Views and Comments**


What are the child/young person/family's view of the assessment and next steps


 Jemima Puddleduck,  Jacob Puddleduck

13. Clicking on the individual names above the box will separate the boxes out so that information can be recorded against each child. Clicking on the name again will put them back together again.


● **Views and Comments**

What are the child/young person/family's view of the assessment and next steps

 Jemima Puddleduck + Include


 Jacob Puddleduck + Include

Addition of Comments

14. Comments can be recorded against each box as necessary. This is particularly useful if you want your manager to view the assessment and respond. Click the  icon beside the box that you want to record a comment against. A comments box will appear beneath the box for you to add comments as required.

● **Summarise the reason for undertaking this assessment**

Children/young people's view

 Comment Delete

Comment From: Assessor

Comment: I'm adding some comments here for my manager to view and respond

15. Once viewed/completed the comments can either be left in the assessment for future reference (they do not print out) or deleted by clicking on the delete link in the corner of the comments box.

Reassigning to a Manager for Oversight (Manager/Practitioner Task)

Assessments can be assigned to a manager at any point during the assessment completion. This is often a better way of gaining oversight on the assessment prior to agreeing the assessment with the family and going through the authorisation process.

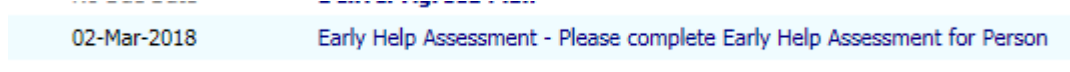
16. To reassign the assessment to a manager open the assessment and click on the Reassign button in the top right hand corner –(please do **not** use the spanner to reassign from your worktray as this works completely differently).

17. The reassign assessment box will appear. Enter assignment notes for your manager.

18. You can select the person to assign the task to by either clicking on the blue people icon to open the address book or by starting to type the worker's details into the field and selecting from the list that appears.

19. Once you have selected the manager click **OK – Reassign** in the top right

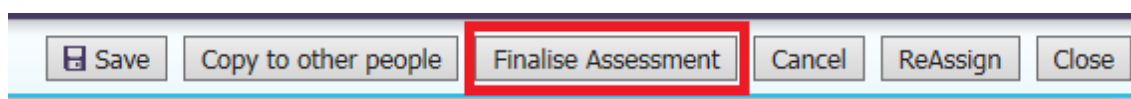
20. The assessment task will be assigned to the manager's tray. The manager can select this task and add comments as per points 14-15 above and then reassign back to the worker following points 16-19 above. These steps can be repeated between worker and manager as necessary.



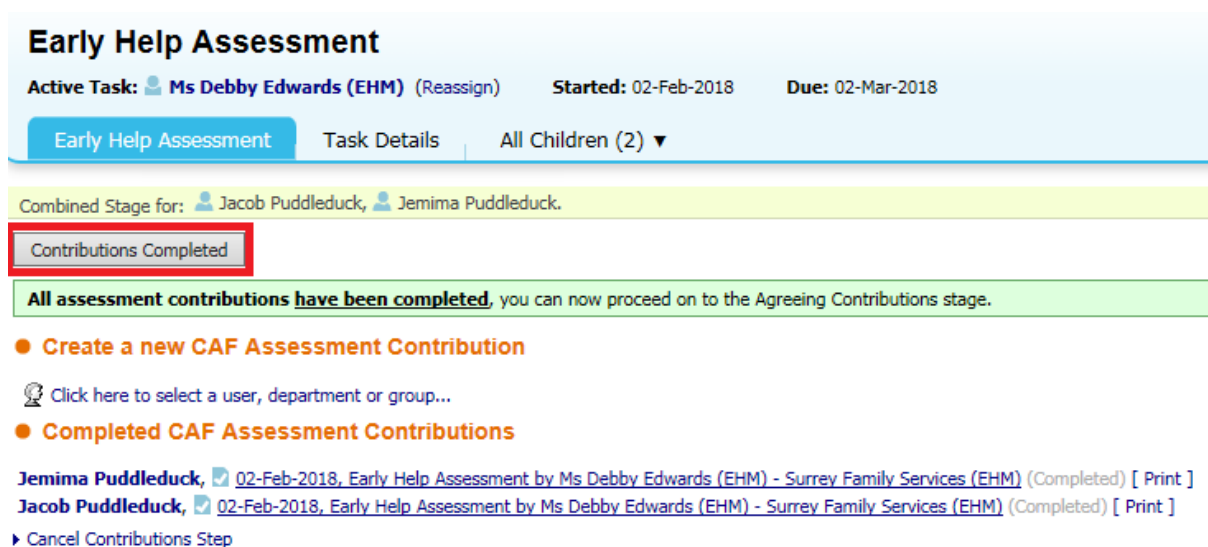
Finalising the Assessment

Once the assessment is complete the worker will need to finalise the assessment and assign to their manager to authorise.

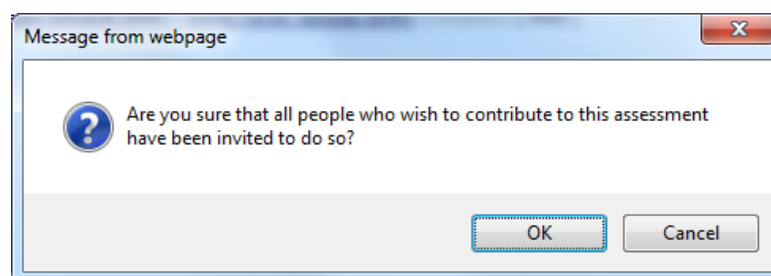
21. Select the assessment task in your tray to open the assessment. Click Finalise Assessment. This may trigger any mandatory questions that require completion. Complete as necessary and click Finalise assessment again.



22. The following screen will appear. Click **Contributions Completed**. Please note that this is an essential step to finalise the assessment and the assessment will not be sent to the manager to authorise if this step is not completed.



23. Click OK to the following message



24. You will now be asked to select who should be authorising this assessment. Again you can use the blue people icon to access the address book or type the person's name into the box and select from the list that appears. Click Assign

Early Help Assessment Agreeing Contributions

Active Task: Ms Debby Edwards (EHM) (Reassign) Started: 02-Feb-2018 Due: 09-Feb-2018

Early Help Assessment Agreeing Contrib... Task Details All Children (2) ▼

Combined Stage for: Jacob Puddleduck, Jemima Puddleduck.

Assign

● Please select a user to authorise this Early Help Assessment:

Episode Coordinator Ms Debby Edwards (EHM)

Other Role Admin Consent (EHM)

DTM Tray EHM Duty Team

Other...

▶ Create New Professional Mr Alex Johnson (EHM)

Ms Alexis Hynds (EHM)

Alexia Sibthorpe (EHM)

Comments:

25. The following task will appear in your manager's tray

09-Feb-2018 **Early Help Assessment - Authorise**

Manager Authorisation (Manager Tasks)

Authorising the Assessment

26. To authorise the assessment select the **Early Help Assessment – Authorise** task in your tray.

09-Feb-2018 **Early Help Assessment - Authorise**

27. The following screen will appear. In order to review/amend the assessment please click the Update Early Help Assessment link (ignore the fact that this says Authorised at the end).

Early Help Assessment Agreeing Contributions

Active Task: Ms Debby Edwards (EHM) (Reassign) Started: 01-Oct-2018 Due: 21-May-2018

Early Help Assessment Agreeing Contrib... Task Details No Other Children ▼

Assessment Authorisation Stage: Review the completed Assessment and amend if applicable. Once satisfied finalise

▶ Update Early Help Assessment by Allie Taylor (EHM) - SFS Guildford Families Team [Authorised]

28. After clicking the link review the assessment as necessary. Comments can be added using the post it function (see points 14 and 15). Once you have checked the document click on the Consent and information sharing section to add manager's comments/signature.

Consent and information sharing

Consent statement for information storage and information sharing

When we consider involving other professionals to support your family, we will keep you informed.

I understand that the information gathered regarding my family is recorded and will be securely stored on an electronic system and share information if there are safeguarding concerns or for the purposes of reducing or preventing anti-social behaviour, crime and

I do not wish information to be shared with the following agencies unless we are required by law to do so:

I/we agree this assessment is an accurate summary of my/our family's situation and agree with the family plan. I/we understand th

Date Assessment Completed:

View Contributions

08-Feb-2018

Signatures

View Contributions

Parent/Carers/Young Persons Name	Signature
The Mother	
The Father	
The Child	

View Contributions

Lead Professionals Name	Signature
The Worker	

Manager Comments

Comments

Manager's Name

Signature

29. Click Finalise Assessment

Save Populate Contribution Answers **Finalise Assessment** Cancel Close

30. You may be presented with the following message advising that only verbal consent has been granted. This is the consent type on the original consent form. Written consent is acquired through parental/young person signature on the assessment so it not necessary to update the consent form. Click OK to this message.

Message from webpage

Only verbal consent has been granted. Are you sure you want to continue?
You must obtain written consent as soon as possible.

OK Cancel

31. You will be returned to the original authorisation screen. If you are happy that the assessment is complete please click Authorise and jump to step 37. If you would like the worker to obtain further information please select Request Further Information.

32. A box will appear asking for the Reason for requesting further information. Complete the box and click Send Request.

33. The assessment will be returned to the worker's tray as follows:

Next Week (2)	Person	Task Description
15-Feb-2018	Jacob Puddleduck, 8 years	Early Help Assessment - Agree Contributions - Reason for requesting further information:
15-Feb-2018	Jemima Puddleduck, 12 years	Early Help Assessment - Agree Contributions - Reason for requesting further information:

34. The worker can click on the assessment and make further amendments as necessary. Once complete the must click Finalise Assessment.

35. They will be presented with the following screen to return the assessment to their manager for authorisation.

36. The Manager can carry out steps 26-37 until they are ready to authorise
 37. Once the manager has clicked Authorise they must then complete the following steps to close the assessment task. Continue the steps after clicking authorise or select the following task from your tray.

Next Week (2)	Person	Task Description
15-Feb-2018	CAF E Jacob Puddleduck, 8 years	Early Help Assessment - Outcomes
15-Feb-2018	CAF E Jemima Puddleduck, 12 years	Early Help Assessment - Outcomes

38. Select the Start button next to Deliver Agreed Plan. Do not select the other available outcomes as this triggers tasks and can cause issues if siblings within the record require closure. The tasks available can be triggered by the worker using the Deliver Agreed Plan stage of the pathway.

39. Click Confirm.

Deliver Agreed Plan - You must confirm the following Date & Reason are correct before continuing with this action.

▶ Deliver Agreed Plan (Completes Automatically)

Date of Initiation or Completion:
04-Jan-2018

40. Click the Outcomes Completed box to complete the Assessment task.

Early Help Assessment Agreeing Contributions

Active Task: **Ms Debby Edwards (EHM)** (Reassign) Started: 08-Feb-2018 Due: 15-Feb-2018

Early Help Assessment Agreeing Contrib... **Decisions** Task Details All Children (2) ▼

Combined Stage for: **Jacob Puddleduck, Jemima Puddleduck.**

● **Outcomes**

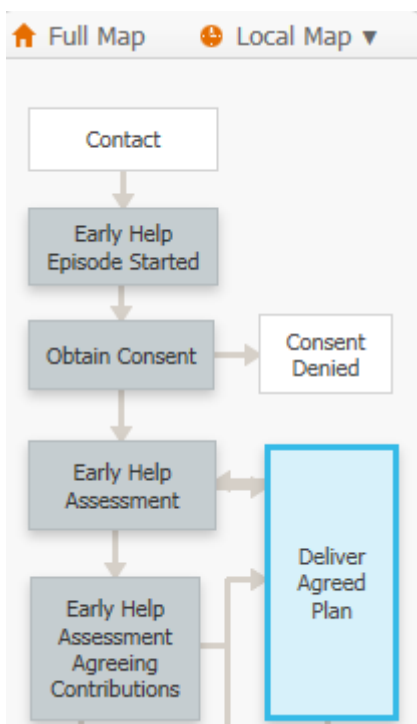
<input type="checkbox"/> Progress to TAF	Active	
<input checked="" type="checkbox"/> Referral to Childrens Social Care	Start	(Assigned to Ms Debby Edwards (EHM))
<input type="checkbox"/> Deliver Agreed Plan	Completed	
<input checked="" type="checkbox"/> Early Help Episode Completed	Start	(Assigned to Yourself)

Decisions Completed:

Date of Initiation or Completion:
08-Feb-2018

Reason for Decision: (reset)
Quarterly review due in 3 months

41. When the assessment task is complete the Early Help Assessment and Agreeing Contributions stage of the pathway will be grey. The deliver agreed plan stage of the pathway will always be blue until the episode is closed.



Reviewing Early Help Assessment

Please note that the assessment does not need to be reviewed unless one of the following occurs:-

- Significant Event
- YRI (to take account of the offences)

42. To review the assessment select the Deliver Agreed Plan task from your tray

No Due Date	Person	Task Description
No Due Date	CAF E Jacob Puddleduck, 8 years	Deliver Agreed Plan
No Due Date	CAF E Jemima Puddleduck, 12 years	Deliver Agreed Plan

43. The following screen will appear showing a list of 'Decisions'/next steps. Click Restart next to the Review Early Help Assessment Decision

Deliver Agreed Plan
Active Task: Ms Debby Edwards (EHM) (Reassign) Started: 08-Feb-2018 Due: unspecified

Deliver Agreed Plan | **Decisions** | Task Details | All Children (2) ▼

Combined Stage for: Jacob Puddleduck, Jemima Puddleduck.

Outcomes

<input checked="" type="checkbox"/> Deliver Agreed Plan	Start (Assigned to Ms Debby Edwards (EHM))
<input checked="" type="checkbox"/> Review Early Help Assessment	Restart Assigned to Ms Debby Edwards (EHM)
<input checked="" type="checkbox"/> Organise next TAF meeting	Start (Assigned to Ms Debby Edwards (EHM))
<input checked="" type="checkbox"/> Referral to Children's Social Care	Start (Assigned to Ms Debby Edwards (EHM))
<input checked="" type="checkbox"/> Early Help Episode Completed	Start (Assigned to Yourself)

Date of Initiation or Completion:

Today's Date

Other Date: [Date Picker] (reset)

Reason for Decision: (reset)

[Text Area]

44. The following screen will appear. Enter a date and click confirm.

Deliver Agreed Plan
Active Task: Ms Debby Edwards (EHM) (Reassign) Started: 08-Feb-2018 Due: unspecified

Deliver Agreed Plan | **Decisions** | Task Details | All Children (2) ▼

Combined Stage for: Jacob Puddleduck, Jemima Puddleduck.

Confirm Cancel

Review Early Help Assessment - You must confirm the following Date & Reason are correct before continuing with this action.

<input checked="" type="checkbox"/> Jacob Puddleduck	Review Early Help Assessment	(Assigned to Ms Debby Edwards (EHM))
<input checked="" type="checkbox"/> Jemima Puddleduck	Review Early Help Assessment	(Assigned to Ms Debby Edwards (EHM))

Date of Initiation or Completion:

Today's Date

Other Date: [Date Picker] (reset)

Reason for Decision: (reset)

[Text Area]

45. The assessment tasks will be placed in your tray. Select the task from your tray and complete this guide from step 1.

Deliver Agreed Plan

Active Task: **Ms Debby Edwards (EHM)** (Reassign) Started: 08-Feb-2018 Due: unspecified

Deliver Agreed Plan **Decisions** Task Details All Children (2) ▼

Combined Stage for: **Jacob Puddleduck, Jemima Puddleduck.**

Outcomes

<input checked="" type="checkbox"/> Deliver Agreed Plan	Start (Assigned to Ms Debby Edwards (EHM))
<input checked="" type="checkbox"/> Review Early Help Assessment	Thank you, this task is in your worktray.
<input type="checkbox"/> Organise next TAF meeting	Start (Assigned to Ms Debby Edwards (EHM))
<input checked="" type="checkbox"/> Referral to Children's Social Care	Start (Assigned to Ms Debby Edwards (EHM))
<input checked="" type="checkbox"/> Early Help Episode Completed	Start (Assigned to Yourself)

Date of Initiation or Completion:

Today's Date

Other Date: (reset)

Reason for Decision: (reset)