

## 6 Team Around the Family – adding and removing people

Members of the **Team around the Family** can be added or removed during the life of a case:

The screenshot shows the Holistix interface for a case summary. The left sidebar contains a menu with 'Case Items' highlighted. A red arrow points from the 'Case Items' menu item to the 'Team around the family' option in the main content area. Another red arrow points from the 'Team around the family' option to a modal window titled 'T Test' which displays a table of case items.

**Case Items Table:**

| Item  | Last Updated | Updated By          | Version | Status |
|---|--------------|---------------------|---------|--------|
| <input type="checkbox"/> Actions                | 09/10/2017   | David QES Test 0910 | N/A     | N/A    |
| <input type="checkbox"/> Assessment             | 09/10/2017   | David QES Test 0910 | 1       | Final  |
| <input type="checkbox"/> CAF Score              | 09/10/2017   | David QES Test 0910 | 1       | Final  |
| <input type="checkbox"/> Case Member Details    | 09/10/2017   | David QES Test 0910 | N/A     | N/A    |
| <input type="checkbox"/> Consent Statement      | 09/10/2017   | David QES Test 0910 | 2       | Final  |
| <input type="checkbox"/> Team around the family | 09/10/2017   | David QES Test 0910 | N/A     | N/A    |
| <input type="checkbox"/> Verbal Consent         | 09/10/2017   | David QES Test 0910 | N/A     | N/A    |

1. View 'Case Items'

2. Click on 'Team around the Family'

You will be taken to the **Team around the Family** page. Here you can add, or remove, Case Members from the Team around the Family.

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Client: TowerHamlets  
Version: V2.1.0  
Environment: UAT

My Messages | **My cases** | Check for case | My settings | Help

In this section:  
Case Summary  
Create Message  
**Case Items** ▶  
Case Alert Settings  
Case Coordination ▶  
View case snapshot  
Audit case events

My Cases > Case Summary > Team Around The Family

### Team around the family

This page lists all of the people who are or have been involved with supporting case members within this case.

[+ Add child](#) [+ Add adult](#) [+ Add practitioner](#) [+ Add Local Services](#)

#### Case Member Relationships

**This case member has no relationships defined**

**Practitioners** Include Past Practitioners?

| Name                | Consent | Role             | National Service    | Local Service | Start Date | End Date |
|---------------------|---------|------------------|---------------------|---------------|------------|----------|
| David QES Test 0910 | Yes     | Case Coordinator | Additional Services |               | 09/10/2017 | N/A      |

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**QES**

Clicking on 'Add Child' or 'Add Adult' will take you to the relevant Create Case Member page.

Click on "Add Practitioner"

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System Users can also be added to case:

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**My Messages** **My cases** **Check for case** **My settings** **Help**

In this section:  
Case Summary  
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My Cases > Case Summary > Add Practitioner

### Add Practitioner to TAF

This page allows you to add a practitioner to the TAF

**Practitioner Type**

Type

**Global User Search**

You must search Holistix for existing users to add them to this case.

**User Details**

Title

First name(s) \*

Surname \*

Requested name

Also known as/previous name

**National Service List Category**

Job Title

National Service \*

Local Service

Local Service Coordinator

**Contact Details**

Contact Number

Type

Email Address \*

Comments

**Associated with**

Case Member(s) No Case Members Selected

**Episode TAF involvements**

1. Select 'System User'

2. Click 'Search'

In this section:

Case Summary

Create Message

**Case Items**

Case Alert Settings

Case Coordination

View case snapshot

Audit case events

My Cases > Case Summary > Add Practitioner

### Add Practitioner to TAF

This page allows you to add a practitioner to the TAF

#### Practitioner Type

Type

#### Global User Search

**Find User** ✕  
Enter none or more fields to search, the search system will restrict results by all of the attributes provided.  
First name   
Surname   
National Service Category   
Local Service

#### National Service List Category

Job Title   
National Service \*   
Local Service No Information Entered  
Local Service Coordinator

#### Contact Details

Contact Number   
Type   
Email Address \*   
Comments

#### Associated with

Case Member(s)

#### Episode TAF involvements

3. Enter the details of the user you are searching for.  
Click on 'Search'

In this section:

[Case Summary](#)

[Create Message](#)

**[Case Items](#)**

[Case Alert Settings](#)

[Case Coordination](#)

[View case snapshot](#)

[Audit case events](#)

[My Cases](#) > [Case Summary](#) > [Add Practitioner](#)

## Add Practitioner to TAF

This page allows you to add a practitioner to the TAF

### Practitioner Type

Type

### Global User Search

You must search Holistix for existing users to add them to this case.

**Find User**

| Surname | Given name(s) | National Service Category       | Local Service |
|---------|---------------|---------------------------------|---------------|
| Majors  | Brad          | Assessment & Early Intervention |               |

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[Back](#)

4. Select the user you wish to have access to the case.

Also known as/previous name

### National Service List Category

Job Title

National Service \*

Local Service

Local Service Coordinator

### Contact Details

Contact Number

Type

Email Address \*

Comments

### Associated with

Case Member(s)

### Episode TAF involvements

## EHA User Guide – Practitioner Manual

The **User's details** will then appear on the form:

Create Message

**Case Items**

Case Alert Settings

Case Coordination

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### ADD PRACTITIONER TO TAF

This page allows you to add a practitioner to the TAF

**Practitioner Type**

Type: System User

**Global User Search**

You must search Holistix for existing users to add them to this case.

Search

**User Details**

Title: [dropdown]

First name(s) \*: Brad

Surname \*: Majors

Requested name: [text]

Also known as/previous name: [text]

**National Service List Category**

Job Title: [text]

National Service \*: Assessment & Early Intervention

Local Service: No Information Entered

Local Service Coordinator:

**Contact Details**

Contact Number: [text]

Type: [dropdown]

Email Address \*: davidhill@qes-online.com

Comments: [text]

**Associated with**

Case Member(s): No Case Members Selected

**Episode TAF involvements**

Start Date: 25/07/2016

End Date: [text]

Reason for Involving: [dropdown]

Save Clear

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5. Select Associated Case Members

6. Once all the details have been entered, click 'Save'

Once you have recorded the involvement of a new practitioner, they will appear on the **Team around the Family** page.

You can also **remove** a practitioner when their involvement ends:

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Client: TowerHamlets  
Version: V2.1.0  
Environment: UAT

My Messages | **My cases** | Check for case | My settings | Help

In this section: [My Cases](#) > [Case Summary](#) > Team Around The Family

**Team around the family** ?

This page lists all of the people who are or have been involved with supporting case members within this case.

[Add child](#) [Add adult](#) [Add practitioner](#) [Add Local Services](#)

**Case Member Relationships**

i This case member has no relationships defined

**Practitioners** Include Past Practitioners?

| Name                | Consent | Role             | National Service    | Local Service | Start Date | End Date |
|---------------------|---------|------------------|---------------------|---------------|------------|----------|
| David QES Test 0910 | Yes     | Case Coordinator | Additional Services |               | 09/10/2017 | N/A      |
| QES Test Test       | No      | Practitioner     | Police              |               | 09/10/2017 | N/A      |

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Click on the person you wish to remove from the Team around the Family to go to their details

The 'Team around the Family' should now reflect your new addition. The list of every member will appear here in a list with their associated role too.

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**My Messages** **My cases** **Check for case** **My settings** **Help**

In this section:  
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My Cases > Case Summary > System User Case Details

### Practitioner Case Details

Here you can see information about how the practitioner is associated to the case member for this case.

[Save](#) [End TAF Member Involvement](#)

#### TAF Information

|                      |   |
|----------------------|---|
| Case Member          | Brad Smith  |
| Start Date           | <input type="text" value="25/07/2016"/> <input type="text" value="12"/> |
| End Date             | <input type="text" value=""/> <input type="text" value="12"/>           |
| Lead Professional    | <input type="checkbox"/>  |
| In Consent           | Yes   |
| Reason for Involving | <input type="text"/>  |

#### User Details

|                             |                                     |
|-----------------------------|-------------------------------------|
| Title                       | <input type="text"/>                |
| First name(s) *             | <input type="text" value="Brad"/>   |
| Surname *                   | <input type="text" value="Majors"/> |
| Requested name              | <input type="text"/>                |
| Also known as/previous name | <input type="text"/>                |

#### National Service List Category

|                           |  |
|---------------------------|--|
| Job Title                 | <input type="text"/>   |
| National Service *        | <input type="text" value="Assessment &amp; Early Intervention"/> |
| Local Service             | No Information Entered   |
| Local Service Coordinator | <input type="checkbox"/>   |

#### Contact Details

|                 |   |
|-----------------|---|
| Contact Number  | <input type="text"/>                                  |
| Type            | <input type="text"/>                                  |
| Email Address * | <input type="text" value="davidhill@qes-online.com"/> |
| Comments        | <input type="text"/>                                  |

Use of Family eCAF is subject to the following [Acceptable use policy](#).

Click on 'End TAF Member Involvement'

**Holistix**

Logged in as Mack TheKnife [Log out](#)

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My Cases > Case Summary > System User Case Details

### Practitioner Case Details

Here you can see information about how the practitioner is associated to the case member for this case.

[Save](#) [End TAF Member Involvement](#)

#### Confirm end involvement

Are you sure you want to end this TAF member involvement?  
If you confirm, you will be redirected back to the TAF summary page for this case.

Reason to End:

  
  

End Date:

[Cancel](#) [Confirm](#)

**TAF Information**  
Case M  
Start D  
End Da  
Lead P  
In Cons  
Reason

**User D**  
Title  
First na  
Sumar  
Reques  
Also known as/previous name

**National Service List Category**  
Job Title  
National Service \*  
Local Service  
Local Service Coordinator

**Contact Details**  
Contact Number  
Type  
Email Address \*  
Comments

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1. Enter the Reason for ending involvement

2. Click 'Confirm'

The Practitioner has now been **removed** from the case:

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 Version: V2.1.0 Environment: UAT

My Messages | **My cases** | Check for case | My settings | Help

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*i* This case member has no relationships defined

**Practitioners** Include Past Practitioners?

| Name   | Consent | Role             | National Service    | Local Service | Start Date | End Date |
|--|---------|------------------|---------------------|---------------|------------|----------|
| <span style="color: green;">✔</span> David QES Test 0910 | Yes     | Case Coordinator | Additional Services |               | 09/10/2017 | N/A      |

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