

14 Creating the Delivery Plan & Review (DPR)

Once an Assessment has been Completed, you can complete a **Delivery Plan Review**:

The screenshot shows the Holistix eEHA system interface. At the top, it says "Welcome to the eEHA system" and "Logged in as Shanur Miah (Trainer)". The navigation menu includes "My Messages", "My cases", "Check for case", "My settings", "My reports", "Administration", and "Help". The "My cases" menu is expanded, showing "Case: 9672 - Smith" and "Case Coordinator: Trainer3 Trainer3". The "Case Notes" menu is also expanded, showing options like "Set Lead Professionals", "Change Case Coordinator", "Create assessment", "Reassessment", "Create Delivery Plan Review", "Create consent statement", "Create supporting stronger families form", "Create eEHA Score", "Case documents", and "Add child to case". The "Create Delivery Plan Review" option is highlighted, and a tooltip shows "Stephen Jones Male, 02/02/1978".

1. Click on 'Case Coordination'

2. Click on 'Create Delivery Plan Review'

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Here you can chose which **Case Members** receive a Delivery Plan & Review:



Welcome to the eEHA system



Logged in as Shanur Miah (Trainer) [Log out](#)

Client: TowerHamlets
Version: V4.2.3
Environment: Training

[My Messages](#) **[My cases](#)** [Check for case](#) [My settings](#) [My reports](#) [Administration](#) [Help](#)

Case: 9672 - Smith Case Coordinator: Trainer3 Trainer3 Status: Assessment

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

Create Delivery Plan & Review

Creating a Delivery Plan & Review will lock this case for other TAF members until it is finalised. This means they will only have read-only access to the case until that happens.

You will also need to select which case members this Delivery Plan & Review should be applied against from the list below.

Case Children

Bart Smith

David Smith

[Create Delivery Plan & Review](#)

1. Select a Family Member

You can only create a Delivery Plan and Review form for a single child at a time.

2. Click on 'Create Delivery Plan & Review.'

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The draft DPR is then created. You are taken to the **Delivery Plan** tab.

The screenshot displays the EHA system interface. At the top, a blue header bar shows the user is logged in as Shanur Miah (Trainer) with a 'Log out' button. The client is identified as 'LowerHamlets', version 'V4.2.3', and environment 'Training'. Below the header is a navigation menu with options: My Messages, My cases (highlighted), Check for case, My settings, My reports, Administration, and Help. A secondary bar shows 'Case: 9672 - Smith', 'Case Coordinator: Trainer3 Trainer3', and 'Status: Delivery'. The main content area is titled 'Delivery Plan & Review' and includes a breadcrumb trail: 'My Cases > Case Summary > Delivery Plan Review'. On the left, a sidebar lists various actions like 'Case Summary', 'Create Message', 'Case Items', 'Case Alert Settings', 'Case Coordination', 'Case Administration', 'View case snapshot', and 'Audit case events'. The main content area has tabs for 'Delivery Plan', 'Meeting Notes', and 'eEHA Score'. Below the tabs, there are 'Save as Draft' and 'Save as Final' buttons. The 'Delivery Plan Review' section contains instructions: 'Actions from any assessment(s) and any previous review(s) will be brought forward into this delivery plan and review. They can only be updated here until the delivery plan and review is finalised. Actions should be updated or added to where a multi-agency TAC response is required and/or used to review progress. Please complete both pages of this form as part of the delivery plan and review process.' and 'Please complete both pages from this form as part of the delivery plan and review process. Until the delivery plan and review is finalised, TAC members will not be able to view it.' Below this is the 'Personal Details' section for a user named David, with a form containing the following fields: Title (Mr), Given name(s) (David), Family name (Smith), Family name first (checked), Also known as/previous name (empty), Gender (Male), and Date of Birth/EDD (01/01/2007, Age: 13). A red arrow points from a green callout box to the 'Given name(s)' field.

1. Check the TAF details to make sure they are correct and amend if necessary.

Date of Birth/EDD * 04/07/2017 12 (Age: 0)

Lead Professional Details

There is no Lead Professional assigned to this case member. [Click Here](#) to set the Lead Professional.

T

Outcomes
Outcomes from assessment
Outcomes from this TAC/TAF meeting

Aims
Aims from assessment
Aims from this TAC/TAF meeting

Actions

Case Member(s) * T Test

Who will do this? * T Test, Hfg Ghghg, David QES Test 0910

Actions to be taken to achieve outcomes * Test

When should this be done by? * 09/10/2017

Action Priority: High Medium Low

Status * Open

Aims associated with this action
No aims are linked with this action

Link Aim

Action Progress and Comments Add Comment

This action does not have any comments.

Save as Draft Save as Final

2. Add any relevant Review Outcomes, Aims or Actions to the DPR.

3. Click on 'Meeting Notes' tab.

Closing Actions

If an action has been completed – whether successful or not, please set the status of it to **closed** (from this drop down) and you can add a relevant comment if needed.

Only actions that are not yet complete should have an **Open** status.

4. Once all the details have been entered click 'Save as Draft'. Then go to Meeting Notes Tab

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You will then be taken to the **Meeting Notes** tab, which will generate information to be completed at (or after) the TAC meeting.



Any field with an * is mandatory and must be completed

Please Note:
This is the date of the review it does not have to have been a TAC / TAF meeting.

Blue tab – the active tab (that you are currently using)

Green tab - mandatory fields have been completed

Grey tab - mandatory fields have not been completed

People identified during the assessment or added to the TAF will appear on this page. If you needed to add other people to the TAF, just add them through Case Items / Team Around the Family, and it will automatically update this screen.

The screenshot shows a 'Meeting Review' form. At the top, there is a 'Next Steps *' section with a text area and a toolbar. Below this is a 'Meeting Review' section with the following fields:

- 'Can the CAF be closed?': A dropdown menu with 'No' selected.
- 'Reason for closure *': A dropdown menu with '{...Please Select...}' selected.
- 'Agreed Review Date': A date input field with a calendar icon.
- 'Is a reassessment required? (If the CAF has been open for six months or more, please consider if the current CAF assessment is still relevant or you need to reassess - recommended.)': A dropdown menu with 'No' selected.
- 'Review notes *': A large text area with a toolbar.
- 'Child / Young person's view on the review and actions identified *': A text area with a toolbar.
- 'Parent/Carer's view on the review and actions identified *': A text area with a toolbar.

At the bottom of the form, there are two buttons: 'Save as Draft' and 'Save as Final'. A red arrow points from the 'Save as Draft' button to step 11 in the list on the right.

3. Enter details of the Next Steps

4. Indicate if the CAF can be closed.

5. If the case can be closed, indicate the reason for closure.

6. Enter the Agreed Review Date

7. Indicate if a reassessment is required

8. Enter Review Notes

9. Enter the Child/ Young Person's Views

10. Enter the Parent/ Carer's Views

11. Once all the details have been entered click 'Save as Draft'. Then go to eEHA Score Tab

If there any errors or missing mandatory fields then these will need to be completed before you can proceed.

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14a eEHA Score



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You will then be taken to the **eEHA Score** tab, which will generate information to be completed at (or after) the TAC meeting.

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

Case: 9672 - Smith | Case Coordinator: Trainer3 Trainer3 | Status: Delivery

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

My Cases > Case Summary > Delivery Plan Review

Delivery Plan & Review

Save as Draft | Save as Final

Delivery Plan | Meeting Notes | **eEHA Score**

Review

eEHA Score prepopulated from form dated 26/02/2020

Associated with

Case Member: David

Practitioner

Practitioner * | Date *

1 2 3 4 5

Health	1	2	3	4	5
General health	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical development	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speech, language and communication	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emotional and social development	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Behavioural development	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identity, self-esteem, self-image and social presentation	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any field with an * is mandatory and must be completed

The eEHA Scores need to be completed

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Participation in learning, education and employment	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Progress and achievement in learning	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aspirations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parents and carers					
Basic care, ensuring safety and protection	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emotional warmth and stability	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guidance, boundaries and stimulation	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family and environmental					
Family history, functioning and well-being	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wider family	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social and community elements and resources, including education	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing Considerations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employment Considerations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Considerations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Score

eEHA Score  43

Notes



Click on 'Save as Final.'

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Always read the **additional messages** in the warning box, they help you to understand exactly what you are confirming.

The screenshot shows a web application interface for a 'Meeting Review'. The main form contains several fields:

- Next Steps ***: A text area containing 'AAAAAAAAAAAAAAAAAAAAAAAAAAAAA'.
- Meeting Review**:
 - Can the CAF be closed?
 - Reason for closure *
 - Agreed Review Date
 - Is a reassessment required?
- Child / Young person's view on the review and actions identified ***: A text area containing 'AAAAAAAAAAAAAAAAAAAAAAAAA'.
- Parent/Carer's view on the review and actions identified ***: A text area containing 'AAAAAAAAAAAAAAAAAAAAAAAAA'.

At the bottom of the form, there are buttons for 'Save as Draft', 'Save as Final', and a printer icon. A modal dialog box is overlaid on the form, titled 'Save TAC/TAF Review as Final'. The dialog contains the text: 'You are about to save this TAC/TAF review as final. Are you sure you wish to continue?' and two buttons: 'Finalise' and 'Cancel'. A red arrow points from a green callout box to the 'Finalise' button.

Click on 'Finalise'

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The Delivery Plan and Review shows as Final in Case Items and is now **Read Only**:

Holistix

LBTH

Logged in as David QES Test 0910 [Log out](#)

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

Case Summary

Case: 9328 - DH Test 0910 Case Coordinator: David QES Test 0910 Status: Delivery

Children

- T Test
Male, 04/07/2017
Age: 0

Adults

- Hfg Ghghg
Male

Case items will be added to the case as it progresses. Selecting the item name will display that item, or a list of those items if there is more than one of that type.

Case Items

T Test Lead Professional: David QES Test 0910 Status: Delivery

Item	Last Updated	Updated By	Version	Status
<input type="checkbox"/> Actions	10/10/2017	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"/> Delivery Plan & Review	10/10/2017	David QES Test 0910	1	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

[Select All](#)

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QES