

## 10 Finalise an Assessment

You can only finalise an assessment from the **Consent Statement tab** and all tabs must be **green** in order to be able to finalise it. When you finalise an assessment, it becomes **read-only** and you cannot make any further changes.

The screenshot shows the Holistix web application interface. At the top, the logo 'Holistix' is displayed. Below it, the user is logged in as 'David QES Test 0910' with a 'Log out' button. The client information is 'TowerHamlets', version 'V2.1.0', and environment 'UAT'. The main navigation menu includes 'My Messages', 'My cases', 'Check for case', 'My settings', and 'Help'. The 'My cases' tab is active, showing 'Child being assessed: T Test'. Below this, there is a breadcrumb trail: 'My Cases > Case Summary > Assessment'. A row of green tabs represents different sections: 'Child / Young Person', 'Parent / Carer Details', 'People Present and Reason', 'Family / Home Situation', 'Services', 'Health', 'Learning', 'Home Environment', 'Conclusion', 'CAF Score', and 'Consent Statement'. The 'Consent Statement' tab is selected. Below the tabs, there are buttons for 'Back', 'Save as draft', and 'Save as final'. The 'Consent Statement(s)' section contains a 'Consent 1' tab and a text area with the following text: "We need to collect the information in this CAF form and record it on Family eCAF so that we can understand what help you may need. If we cannot cover all of your needs we may need to share some of this information with the other organisations specified below, so that they can help us provide the services you need. If we need to share information with any other organisation(s) later to offer you more help we will ask you about this before we do it." "We will treat your information as confidential and we will not share it with any other organisation unless we are required by law to share it or unless you or any other person will come to some harm if we do not share it. In any case we will only ever share the minimum information we need to share." "I understand the information that is recorded on this form and that it will be stored and used for the purpose of providing services." Below this is the 'Consent statement for information storage' section, which includes fields for 'Case Member(s)\*' (T Test), 'Consent Date \*' (09/10/2017), 'Consent granted by \*' (T Test), and checkboxes for 'Signed \*' and 'Privacy notice \*'. The 'Consent statement for information sharing' section has a text area and a checkbox for 'I agree to the sharing of information as agreed between the services below \*'. At the bottom, there is a 'National Service List Consent Options' section with a radio button for 'Additional Services' set to 'Yes'.

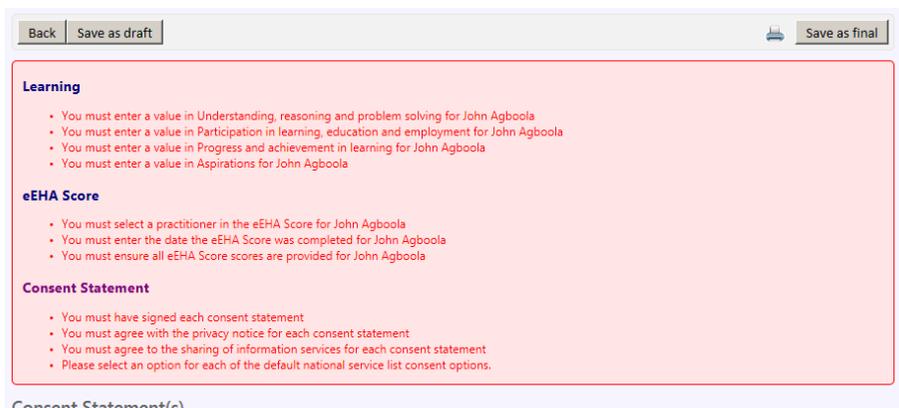
Once all the information has been entered click 'Save as Final.'

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

### \*\*\*\*NOTE\*\*\*\*

**If you have not completed all mandatory fields or errors, you will get a message similar to below telling where the missing data is required. Until this is not completed then you will not be able to finalise the assessment.**



The screenshot shows a software interface with a light blue header bar containing 'Back', 'Save as draft', and 'Save as final' buttons. Below the header is a large red-bordered box containing error messages. The messages are organized into three sections: 'Learning', 'eEHA Score', and 'Consent Statement'. Each section contains a list of bullet points detailing the missing or incorrect information. Below the red box, the text 'Consent Statement(s)' is visible.

Back Save as draft Save as final

**Learning**

- You must enter a value in Understanding, reasoning and problem solving for John Agboola
- You must enter a value in Participation in learning, education and employment for John Agboola
- You must enter a value in Progress and achievement in learning for John Agboola
- You must enter a value in Aspirations for John Agboola

**eEHA Score**

- You must select a practitioner in the eEHA Score for John Agboola
- You must enter the date the eEHA Score was completed for John Agboola
- You must ensure all eEHA Score scores are provided for John Agboola

**Consent Statement**

- You must have signed each consent statement
- You must agree with the privacy notice for each consent statement
- You must agree to the sharing of information services for each consent statement
- Please select an option for each of the default national service list consent options.

Consent Statement(s)

The screenshot shows the Holistix LBTH interface. At the top, the user is logged in as David QES Test 0910. The main navigation bar includes 'My Messages', 'My cases', 'Check for case', 'My settings', and 'Help'. The 'My cases' tab is active, showing a 'Child being assessed: T Test'. Below this, there are tabs for 'Child / Young Person', 'Parent / Carer Details', 'People Present and Reason', 'Family / Home Situation', 'Services', 'Health', 'Learning', 'Home Environment', 'Conclusion', 'CAF Score', and 'Consent Statement'. The 'Consent Statement(s)' section is open, displaying a 'Consent 1' form. A 'Save as Final' dialog box is overlaid on the form, asking 'You are about to finalise this assessment, continue?' with 'Finalise' and 'Cancel' buttons. A red arrow points from a green callout box to the 'Finalise' button.

Click 'Finalise.'

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From the Case Summary, the **Case Items list** shows all the items you have created so far.

Note that the Assessment and Consent statement now show as **Final** and **Version 1** (Final means they are now read only and you cannot make changes to them)

The screenshot shows the Holistix interface for a case summary. The top navigation bar includes 'My Messages', 'My cases', 'Check for case', 'My settings', and 'Help'. The user is logged in as 'David QES Test 0910'. The main content area displays the 'Case Summary' for 'Case: 9328 - DH Test 0910', with a case coordinator 'David QES Test 0910' and a status of 'Delivery'. Below this, there are sections for 'Children' (T Test, Male, 04/07/2017, Age: 0) and 'Adults' (Hfg Ghghg, Male). A 'Case Items' section is expanded, showing a table of items for 'T Test' with a lead professional of 'None assigned' and a status of 'Delivery'.

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	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

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