

## 9 Update an Assessment

Once created, you can complete and finalise an **Assessment form**.

**Holistix**

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

**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:** 8341 - Smith **Case Coordinator:** Mack TheKnife **Status:** Assessment

**Children**

- Brad Smith**  
Male, 21/07/2016  
Age: 0

**Adults**

- Janet Smith**  
Female

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**

**Brad Smith** Lead Professional: None assigned Status: Assessment

Item	Last Updated	Updated By	Version	Status
<input type="checkbox"/> Assessment	22/07/2016	Mack TheKnife	1	Draft
<input type="checkbox"/> Case Member Details	21/07/2016	Mack TheKnife	N/A	N/A
<input type="checkbox"/> Consent Statement	22/07/2016	Mack TheKnife	1	Draft
<input type="checkbox"/> Verbal Consent	21/07/2016	Mack TheKnife	N/A	N/A

[Select All](#)

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

**QES**

From Case Summary, click on the 'Assessment'

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You will be taken to the **Child/ Young Person** tab:

The screenshot shows the Holistix interface for a practitioner. The top navigation bar includes 'My Messages', 'My cases' (highlighted), 'Check for case', 'My settings', and 'Help'. The user is logged in as 'David QES Test 0910'. The main content area is titled '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 'Child / Young Person' tab is active. A message box states: 'The following details are read only, click here to edit the child / young person information.' Below this, there is a 'Date assessment was held\*' field with a date picker set to '12'. The 'Details' section includes fields for Title, Given name(s) \*, Family name \*, Family name first, Also known as/previous name, Gender \* (set to Male), and Date of Birth/EDD \* (set to 04/07/2017, Age: 0). There is also a 'Case Member Relationships' section with a message: 'This case member has no relationships defined'. The 'Contact Details' section is partially visible, showing 'Contact 1' with fields for Contact Number, Type, and Preferred.

1. Check the Child/ Young Person details.

2. If there are any errors or the information needs to be updated the details can be edited by clicking here.

3. Enter the date the Assessment was held

4. After ensuring all the information on the tab is correct, click 'Next'

You will be taken to the **Parent/ Carer Details** tab:

Child being assessed: T Test

My Cases > Case Summary > Assessment

- Child / Young Person
- Parent / Carer Details
- People Present and Reason
- Family / Home Situation
- Services
- Health
- Learning
- Home Environment
- Conclusion
- CAF Score
- Consent Statement

Back Save as draft

Next

The following details are read only, [click here](#) to edit the Parent / Carer information.

Hfg

### Details

Title	<input type="text"/>
First Name(s) *	<input type="text" value="Hfg"/>
Surname *	<input type="text" value="Ghghg"/>
Also known as/previous name	<input type="text"/>
Gender *	<input type="text" value="Male"/>
Date of Birth	<input type="text" value="12"/>

### Case Member Relationships [Add Case Member](#)

This case member has no relationships defined

### Contact Details

Contact 1

#### Contact Details

Contact Number	<input type="text"/>
Type	<input type="text"/>
Preferred	<input type="checkbox"/>
Email Address	<input type="text"/>
Comments	<input type="text"/>

### Address Details

1. Check the Parent/ Carer details.

2. If there are any errors or the information needs to be updated the details can be edited by clicking here.

3. After ensuring all the information on the tab is correct, click 'Next'

You will be taken to the **People Present and Reason** tab - add the following mandatory sections:

Child being assessed: T Test

My Cases > Case Summary > Assessment

- Child / Young Person
- Parent / Carer Details
- People Present and Reason
- Family / Home Situation
- Services
- Health
- Learning
- Home Environment
- Conclusion
- CAF Score
- Consent Statement

Back Save as draft

Next

People present and reason for assessment

Child / Young Persons

Present	Given Name(s)	Family Name	Relationship	Preferred Contact Number
<input type="checkbox"/>	T	Test	Child / Young Person	

Parents / Carers

Present	Given Name(s)	Family Name	Relationship	Preferred Contact Number
<input type="checkbox"/>	Hfg	Ghghg	Parents / Carers	

Case Lead Professional

No Lead Professional Found

Case Coordinator

Present	Given Name(s)	Family Name	Role	Organisation
<input checked="" type="checkbox"/>	David	QES Test 0910	Case Coordinator	

Practitioners

No Practitioners Found

Any Other People Present

1. Indicate which members of the Team around the Family attended the Assessment.

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## People present and reason for assessment

### Child / Young Persons

Present	Given Name(s)	Family Name	Relationship	Preferred Contact Number
<input type="checkbox"/>	Brad	Smith	Child / Young Person	

### Parents / Carers

Present	Given Name(s)	Family Name	Relationship	Preferred Contact Number
<input type="checkbox"/>	Janet	Smith	Parents / Carers	

### Case Lead Professional

**No Lead Professional Found**

### Case Coordinator

Present	Given Name(s)	Family Name	Role	Organisation
<input checked="" type="checkbox"/>	Mack	TheKnife	Case Coordinator	

### Practitioners

**No Practitioners Found**

### Any Other People Present

### What has led to this unborn baby, infant, child or young person being assessed?

**Brad**

Reason for assessment \* {Please Select ...}

Comments B  
:=  
U  
ABC

Is this child/young person stepping down from specialist services? \*

Back Save as draft  Next

2. Enter the Reason for assessment

3. Indicate if the child/ young person is stepping down from specialist services.

4. Once all the sections have been completed, click 'Next'

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



1. Enter the 'Current family and home situation.'  
The text boxes allow you to spell check, bold, underline and add bullet point

2. Select Risks/ Vulnerabilities  
Add multiple if necessary.

3. Once all the details are completed, click 'Next'

You will be taken to the **Services** tab - add the following mandatory sections:

[My Messages](#)

**[My cases](#)**

[Check for case](#)

[My settings](#)

[Help](#)

**Child being assessed:** T Test

My Cases > Case Summary > Assessment

- Child / Young Person
- Parent / Carer Details
- People Present and Reason
- Family / Home Situation
- Services**
- Health
- Learning
- Home Environment
- Conclusion
- CAF Score
- Consent Statement

[Back](#) [Save as draft](#) [Next](#)

Services working with this child or young person

**T** **Universal Services**

**GP**

Please provide as much detail as possible however always include a minimum of surgery name and town \*

Contact Number

**Education status of child/young person**

Please indicate whether the CAF subject is at school, nursery, not of school age or not registered at an EY setting or NEET.\*

**Other Services**

Service	Details	Contact Number
<a href="#">Add Another Service</a>		

[Back](#) [Save as draft](#) [Next](#)

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



1. Enter GP details

2. Indicate Educational Status of the child

3. Once all the details are completed, click 'Next'

You will be taken to the **Health** tab - add the following mandatory sections:



The screenshot shows the Holistix interface. At the top, the logo 'Holistix' is on the left, and 'LBTH' is on the right. Below the logo, it says 'Logged in as David QES Test 0910' with a 'Log out' button. On the far right, it says 'Client: TowerHamlets', 'Version: V2.1.0', and 'Environment: UAT'. A navigation bar contains 'My Messages', 'My cases' (highlighted), 'Check for case', 'My settings', and 'Help'. Below this, a blue bar says 'Child being assessed: T Test'. A breadcrumb trail reads 'My Cases > Case Summary > Assessment'. A row of tabs includes 'Child / Young Person', 'Parent / Carer Details', 'People Present and Reason', 'Family / Home Situation', 'Services', 'Health' (selected), 'Learning', 'Home Environment', 'Conclusion', 'CAF Score', and 'Consent Statement'. The main content area has 'Back', 'Save as draft', and 'Next' buttons. A text box contains instructions: 'Consider each of the elements to the extent they are appropriate in the circumstances. You do not need to comment on every element. Wherever possible, base comments on evidence, not just opinion, and indicate what your evidence is. However, if there are any major differences of view, these should be recorded too.' Below this is the section '1. Development of unborn baby, infant, child or young person' with a sub-section 'Health'. A 'T Test' tab is active. The 'General health' section has a text area on the left and a large empty text box on the right for input. Below the text box are five numbered icons (1-5) representing different health indicators.

1. Complete each Health indicator and provide a comment.

2. Once all the indicators have been completed, click 'Next'

You will be taken to the **Learning** tab- add the following mandatory sections:

**Learning**

**T Test**

**Understanding, reasoning and problem solving**

Understanding, reasoning and problem solving - the ability to understand and organise information, reason and solve problems. Protective Factors The child possesses the ability to understand and organise information, reason and solve problems - age appropriate. Risk Factors The child's ability to understand and organise information, reason and solve problems is significantly impaired. Potential evidence The impact of any disability or impairment or special needs and of any potential for these outcomes; Making connections through the sense and movement, finding out about the environment and other people, becoming playfully engaged and involved, making patters, comparing, categorising, classifying; Being creative, exploring and discovering, experimenting with sound, other media and movement, developing competence and creativity, being resourceful; Being imaginative, imitating, mirroring, moving, imagining, exploring and re-enacting, playing imaginatively with materials using all the senses, pretend play with gestures and actions, feelings and relationships, ideas and words; Exploring, experimenting and playing, discovering that one thing can stand for another, creating and experimenting with one's own symbols and marks, recognising that others may use marks differently; Play and interaction; Demonstration of a range of skills and interests; Numbers as labels and for counting; Calculating; Shape, space and measures; Progress in learning, including any special educational needs identified; Knowledge and understanding of the world. \*

B  
U  
ABC

1

2

3

4

5

1. Complete each Learning indicator and provide a comment.

2. Once all the indicators have been completed, click 'Next'

You will be taken to the **Home Environment** tab - add the following mandatory sections:

The screenshot shows the Holistix LBTH interface. At the top, the user is logged in as 'David QES Test 0910'. The navigation bar 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 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 'Home Environment' tab is selected. The main content area is titled '2. Parents and carers' and contains a section for 'Basic care, ensuring safety and protection'. This section includes a text area for notes and five indicators (1-5) represented by weather icons. A red arrow points from a callout box to the text area, and another red arrow points from a second callout box to the 'Next' button.

1. Complete each Home Environment indicator and provide a comment.

2. Once all the indicators have been completed, click 'Next'

You will be taken to the **Conclusion** tab - add the following mandatory sections:

### Conclusions and analysis of assessment

#### What are your Conclusions and Analysis...?

(What are the child's/young person's/family's strengths and resources, what are their needs - e.g. no additional needs, additional needs, complex needs, risk of harm to self or others)

**Bart Smith**

Strengths & Resources \*

Needs & Risks \*

**Bart Smith** What are your Outcomes? [Add Another Outcome](#)

**Bart Smith** What are your aims? [Add Another Aim](#)

1. Enter the Case Member's Strength's & Resources

2. Enter the Case Member's Needs & Risks

3. Record an Outcome. Add multiple if necessary

4. Record an Aim. Add multiple if necessary

## EHA User Guide – Practitioner Manual

### Agreed actions \*

List the actions agreed for the people present at the assessment as agreed with child/young person.

[+ Add Action](#)

**i** There are no actions assigned to this assessment form.

5. Add Agreed actions. (See Below). Add multiple if necessary

a - Select who will do this

Case Member(s) \* Bart Smith

Who will do this? \* No 'who' Selected

Actions to be taken to achieve outcomes \*

When should this be done by? \* 12

Status \* Open

Aims associated with this action

[+ Link Aim](#)

Remove

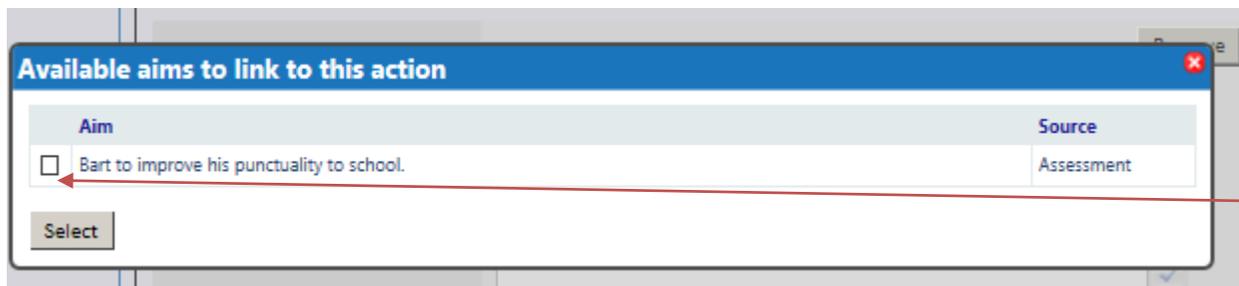
Action Priority: High Medium Low

b. Enter the Actions taken to achieve the outcome.

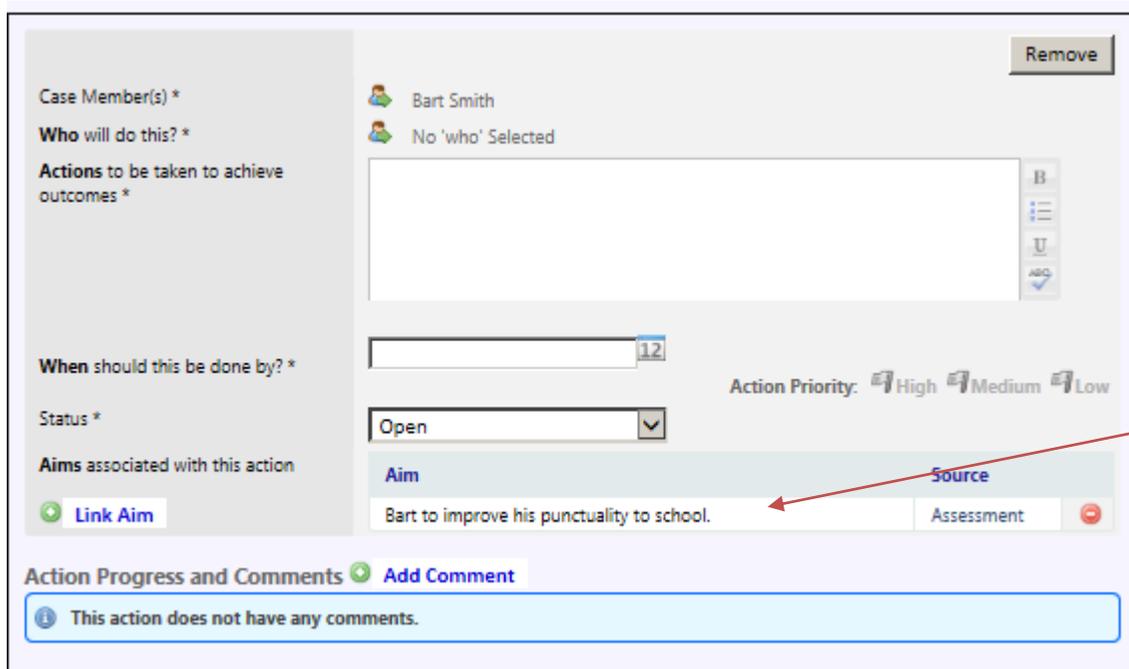
c. Enter when this should be done by.

d. Enter the Action's Status which should be 'Open'.

6. Click 'Link Aim' – Each Action must be linked to an aim.



7- Check the 'Aim' which will be linked to the 'Action' and click the Select button



8- You will now see that the 'Aim' is linked to the 'Action'

## EHA User Guide – Practitioner Manual

**Agreed actions \***  
List the actions agreed for the people present at the assessment as agreed with child/young person.

[+ Add Action](#)

**!** There are no actions assigned to this assessment form.

**TAC / TAF Meeting Date**  
Planned Date \*

**Comments on the assessment and actions identified:**

**Brad Smith** Child, young person, family comments \*

Parent carer comments \*

Practitioner comments \*

**Child Seen Alone**

**Brad Smith** Child Seen Alone?

If not / not appropriate, why? E.g. too young, etc

9. Enter TAC/TAF meeting date, this is when you are due to review this assessment and can be a simple meeting directly with the parent / guardian if appropriate.

10. Enter each individuals comments relating to assessment or actions set.

11. Indicate if the Child was seen alone.

12. Once all sections have been completed, click 'Next'

You will be taken to the **eEHA Score** tab - add the following mandatory sections:

**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

Child being assessed: T Test

My Cases > Case Summary > Assessment

Child / Young Person Parent / Carer Details People Present and Reason Family / Home Situation Services Health Learning Home Environment Conclusion eEHA Score Consent Statement

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CAF Score

Practitioner

Practitioner \*

Date \*

1 2 3 4 5

Health

General health	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical development	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speech, language and communication	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emotional and social development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

1. Enter Practitioner who collected the score.

2. Enter Date of score collection

3. Select each EHA Score by marking one inside each row

4. Click 'Next'

You will be taken to the **Consent Statement** tab – **GDPR – Update (See Page 30)**:

**Child being assessed:** T Test

My Cases > Case Summary > Assessment

- Child / Young Person
- Parent / Carer Details
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- Services
- Health
- Learning
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- Consent Statement**

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### Consent Statement(s)

Consent 1

"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.

#### Consent statement for information storage

Case Member(s)\* T Test

Consent Date \*

Consent granted by \*

Signed \*  I have signed a copy of the consent statement

Privacy notice \*  I have had the reasons for information storage sharing explained to me and I understand those reasons.

#### Consent statement for information sharing

I agree to the sharing of information as agreed between the services below \*

#### National Service List Consent Options

Additional Services  Yes  No  Not Stated

1. Select Case Members

2. Enter Consent Date

3. Enter who granted consent

4. Indicate signature

5. Indicate Privacy notice

6. Chose which services can share the information

signed  I have signed a copy of the consent statement

Privacy notice \*  I have had the reasons for information storage sharing explained to me and I understand those reasons.

**Consent statement for information sharing**

I agree to the sharing of information as agreed between the services below \*

**National Service List Consent Options**

Additional Services	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Stated
Early Help Services i.e. universal and targeted Services	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Stated
Early Years: settings and services	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Stated
Education: Schools and Services	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Stated
Health Services	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Stated
Police	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Stated
Statutory Services e.g. Social Care, YOT, SEN	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Stated
Voluntary and Community Services	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Stated

**Further Information**

**Exceptional circumstances: concerns about significant harm to infant, child or young person**

If at any time during the course of this assignment you are concerned that an infant, child or young person has been harmed or abused or is at risk of being harmed or abused, you must follow your Local Safeguarding Children Board (LSCB) safeguarding procedures. The practice guidance *What to do if you're worried a child is being abused* (HM Government, 2006) sets out the process to be followed by all practitioners.

If you think the child may be a child in need (under section 17 of the Children Act 1989) then you should also consider referring the child to children's social care. These referral processes will be included in your local safeguarding children procedures and are set out in Chapter 5 of *Working Together to Safeguard Children* (2006).

You should seek agreement of the child and family before making such a referral **unless to do so would place the child at increased risk of significant harm.**

Save as draft   Save as final

\*\*\*\*NOTE\*\*\*\*

National Service Consent

1. Any Service as “no” or “not stated” will be blocked from accessing the case and this can be a delay in support services, particularly where multi-agency involvement is required.
2. Early Help **MUST** selected as **Yes**, as the system belongs to Early Help Services and if the family do not consent to this - their data should not be collected on an eEHA at all.

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

**You will need to store evidence of consent for this assessment. This can be carried out by scanning a signed document and uploading this using the case documents upload instructions in this guide. You can still do this after finalising the eEHA.**