



# CareFirst v6 Handbook: Kirklees Children's Services

## Contents

1.	Introduction .....	5
1.1	Purpose .....	5
1.2	Background.....	5
1.3	Exclusions.....	5
1.4	Process descriptions.....	5
1.5	Thanks for assistance.....	5
2.	Contact & Referral Process.....	7
2.1	Telephone contacts received by Gateway to Care .....	7
2.2	Receive telephone contacts By Gateway to Care .....	9
2.3	Telephone contacts received by Duty Admin .....	9
2.4	Contacts in writing (including domestic violence notifications.....	12
2.5	Determine contact outcome.....	14
2.6	Consultation Meetings (SSIPS mtgs) .....	17
2.7	Agency Consultations .....	18
2.8	Section 7 or 37 Court Reports .....	19
2.8.1	Process and Recording issues .....	21
2.9	Referral.....	22
3.	Initial and Core Assessment Process .....	25
3.1	Initial Assessment process .....	25
3.2	Core assessment and CiN plan process.....	28
4.	Care Management - CiN Planning and Review Processes.....	32
5.	Looked After Children Processes.....	36
5.1	Child becomes looked after – initial placement and change of placement /Change of legal status.....	36
5.2	Make and record statutory visit.....	41
5.3	Arrange initial health assessment.....	42
5.5	Arrange subsequent health assessments.....	43
5.6	Arrange for SDQ to be completed .....	45
5.7	Arrange Initial PEP .....	46
5.8	Arrange PEP Review .....	47
5.9	LAC review process.....	47
5.10	Leaving Care .....	50
5.10.1	Other LA Leaving Care child residing in Kirklees.....	53
6.	Child Protection Processes.....	55

6.1	Initiate child protection enquiries and investigation .....	55
6.2	Arrange initial child protection conference .....	59
6.3	Arrange child protection review conference.....	62
6.4	Enquiries regarding children subject to a child protection plan.....	64
7.	Emergency Duty Service.....	67
8.	Access to Record Requests.....	68
9.	Recording Missing Children from other LAs.....	70
10.	Private Fostering .....	72
11.	Other LA Children residing in area either LAC or subject to CP Plan .....	74
12.	CaseClosure .....	75
13.	Children with Disabilities Service Processes .....	77
13.1.1	Written Contacts .....	77
13.1.2	Telephone contacts and referrals from panel .....	80
13.1.3	Record referral.....	82
13.2	Initial and core assessment process.....	84
13.2.1	Initial assessment .....	84
13.2.2	Core assessment.....	86
13.3	CiN planning and service provision .....	88
13.3.1	CiN review process .....	91
13.4	CWD Child protection process.....	92
14.	Case Recording and Updating Basic Details .....	96
15.	Service Recording.....	101

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## 1. Introduction

### 1.1 Purpose

This process handbook describes how CareFirst v6 will be used to record the childcare processes and case recording in Kirklees Children and Young Peoples' Service. The processes are largely a like-for like- transfer from the current processes in place using CareFirst v5.

### 1.2 Background

Kirklees Children's Services will implement Carefirst v6 in place of CareFirst v5 in March/April 2010. This handbook is a key deliverable in the implementation project.

The processes are based on flow charts of the current business processes compiled with the help of practitioners and support staff.

The functionality and capability of CareFirst v6 is not fully utilised in this stage of the transition to CareFirst v6.

OLM professional Services looks forward to working with Kirklees Children and Young Peoples' Service in the future to optimise the use of CareFirst and deliver more effective and efficient ways of working.

### 1.3 Exclusions

This handbook does not document all stages in the social work process, or the processes to maintain documentation in CareStore.

### 1.4 Process descriptions

The process descriptions follow the processes for children in need. The child protection and Looked After Children processes are shown separately. The triggers for initiating child protection or accommodation procedures can occur at almost any stage of the child in need process and for clarity, these have not been included in all the process steps.

### 1.5 Thanks for assistance

Thanks are due to Allyson Clark, ICS Project Manager and her team, plus colleagues at OLM, particularly Rosslyn Mills, Jackie Small and Cathy Lewis Dobson for their expert contributions to this handbook.



## 2. Contact & Referral Process

**Note:** Where child protection concerns are identified, the child protection process will be initiated. When there is an urgent need to accommodate a child the looked after children process will be initiated.

### 2.1 Telephone contacts received by Gateway to Care

Step	Process	Action by	CareFirst Fields/Codes
1.	<p>Telephone contact received.</p> <ul style="list-style-type: none"> <li>If a professional caller – pass call to D&amp;A Admin</li> <li>If other caller go to step 2</li> </ul>	Gateway to Care	
2.	<p>Check CareFirst.</p> <ul style="list-style-type: none"> <li>Go to Worker Desktop. Navigate to find people. Search CareFirst:</li> <li>If the subject is known and the case open, add an Observation, print/fax message to work or team as appropriate</li> <li>If the subject is not known, add a person record</li> </ul> <p>For new and closed cases:</p> <ul style="list-style-type: none"> <li>Add an Initial Contact</li> </ul>	Gateway to Care	<p><b>Observation:</b></p> <p>Subject = Message to an Open Case</p>
3.	If the contact can be handled by Gateway to care (e.g.	Gateway to Care	<b>Initial Contact Outcome:</b>

Step	Process	Action by	CareFirst Fields/Codes
	S17 payments, request for food parcel: <ul style="list-style-type: none"> <li>Update CareFirst –outcome the Initial Contact</li> </ul>		C- no action required Or C- advice and information given
4.	If the contact is to be handled by S&SP: <ul style="list-style-type: none"> <li>Update CareFirst – outcome the Initial Contact</li> <li>Add Event of Contact Evaluation, assigned to the D&amp;A allocation team code (CYPDASAL).</li> <li>Record the Event priority as 'entered by SSIPS'.</li> </ul>	Gateway to Care	<b>Initial Contact Outcome:</b> C – passed to CYPS safeguarding <b>Event Context:</b> ICS <b>Event Type:</b> Contact Evaluation <b>Event Class:</b> Initial Assessment/Screening
5.	Go to Section 2.2 - Receive telephone contacts recorded by Gateway to Care		

2.2 Receive telephone contacts By Gateway to Care

Step	Process	Action by	CareFirst Fields/Codes
1.	Check D&A Allocation Team Desktop	Duty CCO	All workers in the duty team are linked to the duty team, the D&A allocation team does not have any workers linked to it. It is there to identify contacts coming into the unit that need to be actioned.
2.	Navigate to Caseload <ul style="list-style-type: none"> <li>Open each Contact Evaluation Event – amend priority to ‘received by CYPS’.</li> <li>File Details - Add ESCR and paper file details</li> <li>Add a Team Allocation to the D&amp;A duty team (CYPDUTY)</li> </ul>	Duty CCO	<b>File Details:</b> Recording File Details replaces adding ESCR marker via contacts. File Type is either Electronic Record or Paper Record  <i>Note: Priority can be viewed by going into details of Event from Caseload</i>
3.	<a href="#">Go to Section 2.5 - Determine contact outcome</a>		

2.3 Telephone contacts received by Duty Admin

Step	Process	Action by	CareFirst Fields/Codes/Rules
1.	Telephone contact received	Admin	

Step	Process	Action by	CareFirst Fields/Codes/Rules
2.	<p>Check if child known to CareFirst:</p> <ul style="list-style-type: none"> <li>Go to Worker Desktop. Navigate to find people and Search CareFirst to check if child known:</li> <li>Open case (Open Event assigned to worker or team) – go to step 3</li> <li>Closed / not known, call is transferred to the duty room CCO's – go to step 4</li> </ul>	Admin	<p>Searching Rules:</p> <p>To avoid creating duplicated records please ensure you carry out at least 3 separate searches: name, address and age range if the name of the child, the address and approximate age is known. If only the name of the child is known then at least 2 searches should be undertaken to take account of unusual names/spellings.</p>
3.	<p>Action on open case:</p> <ul style="list-style-type: none"> <li>If Allocated worker is available – transfer call</li> <li>If allocated to team – transfer call to team manager</li> <li>If not available – send worker email message</li> </ul> <p>End of process</p>	Admin	
4.	Gather information about subject from caller – record on paper assessment form (or Word Template)	Duty CCO	

Step	Process	Action by	CareFirst Fields/Codes/Rules
5.	<p>Action on not known case:</p> <ul style="list-style-type: none"> <li>Add Person Record</li> </ul> <p>Action if child is known to CareFirst:</p> <ul style="list-style-type: none"> <li>Check role = C for client, if not update as appropriate</li> <li>Check current Main Address is correct, if not, update as appropriate</li> </ul> <p>Action on all cases:</p> <ul style="list-style-type: none"> <li>Add Initial Contact and record outcome (c-passed to CYPS safeguarding).</li> <li>Add Subsequent Event of Contact Evaluation</li> <li>File Details - Add ESCR and paper file details</li> <li>Add Team allocation to the D&amp;A duty team (CYPDUTY)</li> </ul>		<p><b>Person Record:</b></p> <ul style="list-style-type: none"> <li>Role = C - client of social services</li> <li>Gender, DOB and ethnicity should always be added. Religion and 1<sup>st</sup> language are optional</li> </ul> <p><i>Note: See Step 6 for notes on Addresses</i></p> <p><b>Initial Contact code if UASC Case:</b></p> <ul style="list-style-type: none"> <li>Topic = C- request for service</li> <li>Presenting issue = seeking asylum</li> </ul> <p><b>Contact Evaluation Event:</b></p> <ul style="list-style-type: none"> <li>Assigned to the D&amp;A duty team code (CYPDUTY)</li> </ul> <p><b>File Details:</b></p> <p>Recording File Details replaces adding ESCR marker via contacts.</p> <p>File Type is either Electronic Record or Paper Record</p> <p style="text-align: right;"><b>Page 11 of 101</b></p> <p><i>Note: Family members are not added at this stage – but added when the case is closed.</i></p> <p style="text-align: right;"><small>Commercial In Confidence</small></p>

Step	Process	Action by	CareFirst Fields/Codes/Rules
6.	<p>If subject's home address is not found in the CareFirst gazetteer then?</p> <ul style="list-style-type: none"> <li>• Add the general address of CHECK (in the postcode field)</li> <li>• Add the actual address in the address notes field</li> <li>• Complete an E form (on the Intranet) for the attention of the ISU</li> </ul>		<p>On completion, the ISU e-mails Admin to say the address has been added and Admin should update the address on the child's record.</p> <p>The following additional addresses can also be used:</p> <ul style="list-style-type: none"> <li>• NO – no fixed abode or homeless</li> <li>• CONF – if child placed in a women's refuge. The details of the refuge should be recorded in the address notes field</li> </ul>
7.	<a href="#">Go to Section 2.5 – Determine Contact Outcome</a>		

2.4 **Contacts in writing (including domestic violence notifications)**

Step	Process	Action by	CareFirst Fields/Codes
1.	<p>Receive written contact (letter / FAX)</p> <p>Receive domestic violence notifications and referrals from Police CP unit by email. Print email.</p>	Admin	<p>Some written contacts are from other agencies requesting information or giving us information e.g. from CAFCASS or housing evictions. These contacts are not recorded on CareFirst.</p>

Step	Process	Action by	CareFirst Fields/Codes
2.	<p>Go to Worker Desktop. Navigate to find people. Search CareFirst to check case status in MyCareFirst:</p> <ul style="list-style-type: none"> <li>• If a domestic violence go to step 3</li> <li>• Open case (Open Event assigned to worker or team) – go to step 4</li> <li>• Closed / not known - go to step 5</li> </ul>		
3.	<p>Action on Domestic Violence notifications and referrals.</p> <ul style="list-style-type: none"> <li>• If the subject is known write the CareFirst id and details on the print out.</li> <li>• Pass all printouts to the Duty Manager for screening.</li> </ul> <p>If a referral is required the case is passed to the duty CCO and processed in the usual way.</p> <p>If no action is required:</p> <ul style="list-style-type: none"> <li>• Add a person record for unknown cases.</li> <li>• Add an Initial Contact and outcome (c – no action required)</li> <li>• Send letter to parents to confirm the action. Upload copy of letter and printed e mail to CareStore</li> </ul>	Admin	<p><b>Initial Contact Recording:</b></p> <ul style="list-style-type: none"> <li>• Presenting issue = domestic violence</li> <li>• If the contact is a DV notification the initial contact topic = C-notification</li> <li>• If the contact is a DV referral the initial contact topic = c-request for service</li> <li>• Notes field for open case = include “passed to allocated worker”</li> </ul> <p><b>Note:</b> <i>If open case, no event is required</i></p>

Step	Process	Action by	CareFirst Fields/Codes
4.	Action on open case: <ul style="list-style-type: none"> <li>• Redirect letter / FAX to appropriate team</li> </ul> End of process		
5.	Action for new case or closed case: <ul style="list-style-type: none"> <li>• Add Team Allocation to the D&amp;A Duty Team (CYPDUTY)</li> <li>• Place contact papers in Duty Manager Tray</li> </ul> <b>Note:</b> there is a separate tray for DV notifications	Admin	
6.	<a href="#">Go to Section 2.5 – Determine Contact Outcome</a>		

2.5 **Determine contact outcome**

Step	Process	Action by	CareFirst Fields/Codes
1.	Determine if referral is required: <ul style="list-style-type: none"> <li>• Print out an 'Action Plan' form and record decisions and actions.</li> <li>• If No, go to step 2 below.</li> <li>• If Yes, go to Step 5 below</li> </ul>	Duty Manager Duty CCO	

Step	Process	Action by	CareFirst Fields/Codes
2.	Pass papers to Admin	Duty CCO	
3.	<p>Update CareFirst:</p> <p>For telephone contacts</p> <ul style="list-style-type: none"> <li>• Navigate to subject's MyClient screen:</li> <li>• Open Contact Evaluation Event &amp; record Event Outcome</li> <li>• Record the Reason</li> <li>• Record the id of the manager making the decision as the Supervisor</li> <li>• If case closing go to step 4</li> <li>• If case progressing to a referral go to step 5</li> </ul> <p>For written contacts</p> <ul style="list-style-type: none"> <li>• From Worker Desktop navigate to Find People</li> <li>• Search for subject, Add Person Record if not found,</li> <li>• Add and Outcome Initial Contact and Contact Evaluation Event.</li> <li>• If case closing go to step 4</li> <li>• If case progressing to a referral go to step 5</li> </ul>	Duty Admin	<p><b>Initial Contact Code if CAF form:</b></p> <p>Method = CAF form</p> <p><b>Contact Evaluation Event:</b></p> <p>Outcome of Event = Completed</p> <p>Outcome Reason =</p> <p>Passed on as a referral</p> <p>Referred to other agency</p> <p>Referred to other agency – CAF recommended</p> <p>No further action required</p> <p>Information/advice provided</p> <p>Outcome of Event = Abandoned</p> <p>Outcome Reason =</p> <p>Child care problems resolved</p>

Step	Process	Action by	CareFirst Fields/Codes
			Child changed address Child reached threshold age  Child/carer declined assessment Failed to meet threshold criteria Child died  Priority: No priority
4.	Navigate to subject's MyClient screen: Person Details/ File Details folder, record File Destruction Date Network/Personal, professional and Allocation Relationships and end allocation to D&A Duty Team (CYPDUTY)	Admin	There is a data retention/file destruction policy that all staff should be aware of.

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>For cases progressing to Referral, update CareFirst</p> <ul style="list-style-type: none"> <li>• Add the subject's record (if not already entered)</li> <li>• Add the Initial Contact &amp; outcome (if not already recorded)</li> <li>• Add the Contact Evaluation Event (if not already recorded)</li> <li>• Add Team Allocation to D&amp;A duty team (CYPSDUTY)</li> <li>• Add Referral Evaluation Event, Assigned to D&amp;A Team / Duty CCO</li> </ul>	Duty CCO	
6.	<a href="#">Go to section 2.9 - Referral</a>		

## 2.6 Consultation Meetings (SSIPS mtgs)

When it is decided to invite parents to a consultation meeting prior to decision to proceed to referral update CareFirst as follows:

Step	Process	Action by	CareFirst Fields/Codes
1.	Open the Contact Evaluation Event and add a Contact Consultation Activity	Duty CCO	<p><b>Consultation Activity:</b></p> <p>Class = C&amp;F Contact Consultation</p> <p>Type = Contact Consultation Mtg</p> <p>Required Date = Planned Meeting Date</p>
2.	After Consultation Meeting: Complete Activity and determine Contact Outcome – See Section 2.5		<p><b>Contact Evaluation Event:</b></p> <ul style="list-style-type: none"> <li>• Outcome = Completed</li> <li>• Reason: <ul style="list-style-type: none"> <li>• Passed on as referral</li> <li>• Referred to other agency</li> <li>• Referred to other Agency – CAF recommended</li> <li>• No further action required</li> <li>• Information/advice provided</li> </ul> </li> </ul>

## 2.7 Agency Consultations

When a professional rings up requesting advice rather than wanting to make a referral, update CareFirst as follows:

Step	Process	Action by	CareFirst Fields/Codes
1.	<p>Check CareFirst.</p> <ul style="list-style-type: none"> <li>Go to Worker Desktop. Navigate to find people, Search CareFirst:</li> <li>If the subject is known and the case open, Add an Observation</li> <li>If the subject is not known, add a person record</li> </ul> <p>For new and closed cases: Add an Initial Contact</p>	Duty CCO	<p><b>Initial Contact Recording:</b></p> <ul style="list-style-type: none"> <li>Presenting issue = Advice &amp; Information</li> <li>Topic = C-Consultation.</li> <li>Outcome = C – info and advice given</li> </ul> <p>Searching Rules: To avoid creating duplicated records please ensure you carry out at least 3 separate searches: name, address and age range if the name of the child, the address and approximate age is known. If only the name of the child is known then at least 2 searches should be undertaken to take account of unusual names/spellings.</p> <p><i>Note: These cases do not proceed to Contact Evaluation or Referral</i></p>

2.8 **Section 7 or 37 Court Reports**

Normally added by D&A however if case is open or open recently, event will be transferred to worker:

Step	Process	Action by	CareFirst Fields/Codes
1.	<p>Check CareFirst.</p> <ul style="list-style-type: none"> <li>Go to Worker Desktop. Navigate to find people.</li> </ul> <p>Search CareFirst:</p> <ul style="list-style-type: none"> <li>If the subject is known and the case open, Add an Observation</li> <li>If the subject is not known, add a person record</li> </ul> <p>For new and closed cases:</p> <ul style="list-style-type: none"> <li>Add an Initial Contact</li> <li>Add Court Report Event</li> </ul>	Admin	<p><b>Person Role = C-</b> client of social services</p> <p>Searching Rules: To avoid creating duplicated records please ensure you carry out at least 3 separate searches: name, address and age range if the name of the child, the address and approximate age is known. If only the name of the child is known then at least 2 searches should be undertaken to take account of unusual names/spellings.</p> <p><b>Initial Contact Recording:</b></p> <ul style="list-style-type: none"> <li>Presenting issue = Court Report</li> <li>Topic = Information</li> <li>Outcome = C - Passed to Safeguarding</li> </ul> <p><b>Court Report Events:</b></p> <ul style="list-style-type: none"> <li>Context = Court</li> <li>Type = Either Section 7 Court Report or Section 37 Court Report</li> <li>Class = Initial assessment/screening</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
2.	Complete Court Report Event when Court Report written	Admin	<b>Court Report Events:</b> <ul style="list-style-type: none"> <li>• Outcome = Complete</li> <li>• Reason = No further action required</li> </ul>

2.8.1 **Process and Recording issues**

Contacts, referrals and assessments are recorded for each child, however this is not done in real time. If there is more than 1 child in a family referred the initial contact and contact evaluation Event are added to the youngest child's record. Information for the remaining children is added when the case is closed or passed to the Care Management Unit.

2.9 Referral

**Note:** Where child protection concerns are identified the child protection process will be initiated. When there is an urgent need to accommodate a child the Looked After process will be initiated.

Step	Process	Action by	CareFirst Fields/Codes
1.	Assign Worker to referral	Duty Manager	
2.	Record Assignment in CareFirst <ul style="list-style-type: none"> <li>Navigate to subject's MyClient</li> </ul> Open Event, Add Worker id	Duty Admin or Manager	
3.	Undertake referral: <ul style="list-style-type: none"> <li>Gather information</li> <li>Record in referral section of assessment record on G: Drive.</li> <li>Print completed assessment record</li> <li>Write/print/ send letters as appropriate.</li> </ul>	Assigned Worker	
4.	Place copy of assessment record in appropriate tray		
5.	Manager determines referral outcome and records on slip in front of blue file <ul style="list-style-type: none"> <li>NFA – Case closed</li> </ul>	Duty Manager	

Step	Process	Action by	CareFirst Fields/Codes
	<ul style="list-style-type: none"> <li>Initial Assessment</li> <li>Initial Assessment CP concerns</li> </ul>		
6.	<p>Record outcome in CareFirst:</p> <ul style="list-style-type: none"> <li>Navigate to subject's MyClient screen.</li> <li>Open Referral Evaluation Event, Add outcome details.</li> <li>If case is closed go to step 7</li> <li>If case is to remain open Add Initial Assessment Event, Assign worker to Event.</li> <li>If case is an Unaccompanied Assylum Seeking Child, Add Age Assessment Event</li> <li>Navigate to Network via My Client screen. Add Allocation Relationship (primary worker) for worker to case</li> <li>Add Team Allocation Relationship</li> <li><a href="#">Go to Section 3.1 – Initial assessment process</a></li> </ul>	Duty Admin	<p><b>Referral Evaluation Event:</b></p> <p>Outcome = completed</p> <p>Valid reason codes are:</p> <ul style="list-style-type: none"> <li>Initial assessment required</li> <li>Referred to other agency</li> <li>Referred to other agency – CAF recommended</li> <li>No further action required</li> <li>Information/advice required</li> </ul> <p>Supervisor / authorised by = id of manager making the decision</p> <p><b>Initial Assessment Event:</b></p> <ul style="list-style-type: none"> <li>Context = ICS</li> <li>Type = initial assessment</li> <li>Class = full assessment &amp; review</li> </ul> <p><b>Age Assessment Event:</b></p> <ul style="list-style-type: none"> <li>Context = Unaccompanied asylum seeker</li> <li>Type = UASC age assessment</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
7.	Complete case closure process: <ul style="list-style-type: none"> <li>• Navigate to subject's Person Details screen</li> <li>• Open File Details folder, Add Destruction Date</li> <li>• End Team Allocation Relationship</li> <li>• Pass file to admin</li> </ul>	Duty Admin	There is a data retention/file destruction policy that all staff should be aware of.
8.	Complete scanning / filing as required.	Admin	

### 3. Initial and Core Assessment Process

**Note:** Where child protection concerns are identified the child protection process will be initiated. When there is an urgent need to accommodate a child the Looked After process will be initiated.

#### 3.1 Initial Assessment process

Step	Process	Action by	CareFirst Fields/Codes
1.	Undertake Initial Assessment <ul style="list-style-type: none"> <li>Record evidence and findings on Initial Assessment section of assessment record on G: Drive.</li> <li>Record personal/professional Relationships and CiN code in assessment form.</li> <li>Print out assessment, sign &amp; file. Place blue file in Duty Manager's tray.</li> </ul>	Allocated Worker	<i>Note: If a case is co worked e.g. with a student the second worker will be added with an allocation relationship of secondary worker.</i>  Ensure family members are fully cross referenced
2.	Determine outcome of assessment and complete allocation slip. <ul style="list-style-type: none"> <li>NFA – case closure – pass file to admin</li> <li>CP/Child in Need – liaise with Child Concern Managers re case allocation. Then pass file to Duty Admin</li> </ul>	Duty Manager	

Step	Process	Action by	CareFirst Fields/Codes
3.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Navigate to subject's MyClient screen</li> <li>Add Professional and Personal Relationships via Network screen</li> <li>Open the Event and record outcome of Initial Assessment Event and Age Assessment Event if UASC case</li> </ul> <p>If case is to be closed go to step 5, otherwise continue to step 4</p>	Admin/Duty Admin	<p><b>Initial Assessment Event:</b></p> <ul style="list-style-type: none"> <li>Outcome code = completed</li> </ul> <p>Valid reason codes are:</p> <ul style="list-style-type: none"> <li>Core assessment required</li> <li>Strategy discussion required</li> <li>Referred to other agency</li> <li>Referred to other agency CAF recommended</li> <li>No further action required</li> <li>Information/advice provided.</li> </ul> <p><b>UASC Age Assessment Event (If Required):</b></p> <ul style="list-style-type: none"> <li>Outcome code = completed</li> </ul> <p>Valid reason codes are:</p> <ul style="list-style-type: none"> <li>No further action required</li> </ul> <p>Ensure family members are fully cross referenced</p>

Step	Process	Action by	CareFirst Fields/Codes
4.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Add Next Event of Core Assessment, assigned to Concern Team.</li> <li>Update Allocation Relationships with end of Duty Worker and Team involvement add new relationship with Concern Team</li> <li>In Person Details, Add CiN Classification</li> </ul> <p><a href="#">Go to Section 3.2 Core Assessment and CiN plan process</a></p>	Admin/Duty Admin	<p><b>Core Assessment:</b></p> <ul style="list-style-type: none"> <li>Context = ICS</li> <li>Type = Core Assessment</li> </ul> <p><b>CiN Classification:</b></p> <ul style="list-style-type: none"> <li>N1- abuse or neglect</li> <li>N2 child's disability or illness</li> <li>N3 – parental disability or illness</li> <li>N4 – Family in acute stress</li> <li>N5- Family dysfunction</li> <li>N6- Socially unacceptable behaviour</li> <li>N7 – Low income</li> <li>N8 – Absent parenting</li> <li>N9- cases other than CiN</li> <li>Type = Core Assessment</li> </ul> <p>If there is difficulty choosing between two or more categories of need, choose the category that comes highest up in the list.</p>

Step	Process	Action by	CareFirst Fields/Codes
5.	Complete case closure process: <ul style="list-style-type: none"> <li>Navigate to Relationships (or Network) screen. End Worker Allocation and Team Allocation Relationship.</li> <li>Navigate to Person Details / File Details folder, Add file destruction date.</li> </ul>	Admin	There is a data retention/file destruction policy that all staff should be aware of.
6.	Complete scanning / filing as required.		

### 3.2 Core assessment and CiN plan process

**Note:** Where child protection concerns are identified the child protection process will be initiated. When there is an urgent need to accommodate a child the Looked After process will be initiated.

Step	Process	Action by	CareFirst Fields/Codes
1.	Allocate worker <ul style="list-style-type: none"> <li>Navigate to subject's MyClient screen and re-assign Event to Worker.</li> <li>Navigate to Network screen. Add Allocation Relationship to worker (primary worker) and team.</li> </ul>	Concern Manager Team	

Step	Process	Action by	CareFirst Fields/Codes
2.	<p>Undertake Core Assessment</p> <ul style="list-style-type: none"> <li>Record evidence and findings in the core assessment section of the Assessment Record, G: Drive.</li> <li>Liaise with Team Manager re needs &amp; outcome.</li> <li>If case is to be closed go to step 5</li> <li>If services are to be provided go to step 3</li> </ul>	Allocated worker	
3.	<p>Arrange CiN Planning Meeting</p> <ul style="list-style-type: none"> <li>Agree CiN plan and Lead Professional</li> <li>Complete CiN Plan (G: Drive)</li> <li>Print out CiN Plan and Assessment, pass to Team Manager</li> </ul>		
4.	<p>Sign Assessment Record &amp; CiN Plan</p> <ul style="list-style-type: none"> <li>Pass file to Admin</li> </ul>	Concern Team Manager	

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>Update CareFirst:</p> <p>Case to remain Open (to be transferred to Care Mgt)</p> <ul style="list-style-type: none"> <li>Navigate to the subjects MyClient screen:</li> <li>Update Relationships via Network screen:               <ul style="list-style-type: none"> <li>Personal</li> <li>Professional</li> <li>Allocation (End existing worker and team allocation add new Allocation Relationship to Care Management Allocation Team (CYPCMSAL))</li> </ul> </li> <li>Open Event, add CIN plan activity and enter outcome of Core Assessment. Enter Id of manager making the decision.</li> <li>Add Next Event of Ongoing Service Provision, Assigned to Care Management Allocation Team</li> </ul> <p><a href="#">Go to Section 4 – Care Management CIN planning and review process</a></p> <p>If the case is to be closed :</p> <ul style="list-style-type: none"> <li>Navigate to the subjects MyClient screen:</li> <li>Update Relationships via Network screen:               <ul style="list-style-type: none"> <li>Personal</li> </ul> </li> </ul>	Admin	<p><b>CiN Plan Activity:</b></p> <ul style="list-style-type: none"> <li>Class = CIN plan</li> <li>Type = CIN plan</li> <li>Assigned to = Worker</li> <li>Requested/required by/status date = date plan completed</li> <li>Status = Completed</li> </ul> <p><b>Core Assessment Event:</b></p> <ul style="list-style-type: none"> <li>Outcome code = Completed</li> </ul> <p>Valid reason codes are:</p> <ul style="list-style-type: none"> <li>Services provided</li> <li>Services provided – MAST plan</li> <li>Referred to other agency</li> <li>Referred to other agency CAF recommended</li> <li>No further action required</li> <li>Information/advice provided.</li> </ul> <p>Ensure family members are fully cross referenced</p> <p><b>OnGoing Service Provision Event:</b></p> <p>Context = ICS</p> <p>Type = Ongoing Service Provision</p>

Step	Process	Action by	CareFirst Fields/Codes
6.	Scan / file documents as required.		

4. **Care Management - CiN Planning and Review Processes**

**Note:** Where child protection concerns are identified the child protection process will be initiated. When there is an urgent need to accommodate a child the Looked After process will be initiated.

Step	Process	Action by	CareFirst Fields/Codes
1.	Manage case allocation: <ul style="list-style-type: none"> <li>• Check CareFirst Team Desktop /caseload for new cases awaiting allocation (Open Event assigned to Team).</li> <li>• Allocate cases at supervision, advise admin of decisions.</li> </ul>	Team manager	
2.	Update CareFirst <ul style="list-style-type: none"> <li>• Navigate to subject's MyClient. Reassign Service Provision Event to worker.</li> <li>• Add Allocation Relationship (primary) with worker</li> <li>• Update Team Allocation</li> </ul>	Admin	

Step	Process	Action by	CareFirst Fields/Codes
3.	Undertake on-going case work: <ul style="list-style-type: none"> <li>• Add CiN Review Activity.</li> <li>• Visit child and family</li> <li>• Consult other professionals</li> <li>• Implement CIN plan and monitor services.</li> </ul>	Allocated Worker	<b>CiN Review Activity:</b> <ul style="list-style-type: none"> <li>• Class = C&amp;F reviews</li> <li>• Type = CIN plan review</li> <li>• Assigned to = Worker</li> <li>• Requested and status date = current date</li> <li>• Required By = scheduled date for review</li> <li>• Status = newly generated</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
4.	<p>Plan and Hold CiN Review Meeting:</p> <p>Update CareFirst:</p> <p>Case to Remain open:</p> <ul style="list-style-type: none"> <li>Complete CiN Review Activity</li> <li>Add Activity for date of next CiN Plan review</li> </ul> <p>Case to Close:</p> <ul style="list-style-type: none"> <li>Complete CiN Review Activity</li> </ul> <p>Go to Step 6</p>	Allocated Worker	<p><b>Existing CIN Plan Review Activity:</b></p> <ul style="list-style-type: none"> <li>Class = C&amp;F reviews</li> <li>Type = CIN plan review</li> <li>Status date = date review took place</li> <li>Status = Completed</li> </ul> <p><b>New CIN Plan Review Activity:</b></p> <ul style="list-style-type: none"> <li>Class = C&amp;F reviews</li> <li>Type = CIN plan review</li> <li>Requested and status date = current date</li> <li>Required By = scheduled date for review</li> <li>Status = newly generated</li> </ul>
5.	Prepare, distribute and scan minutes	Admin	
6.	<p>Close Case:</p> <ul style="list-style-type: none"> <li>Prepare handover to other agency, if appropriate</li> <li>Prepare Closing Summary (G:Drive)</li> </ul>	Allocated Worker	

Step	Process	Action by	CareFirst Fields/Codes
7.	<p>Update CareFirst:</p> <p>Case to Close:</p> <ul style="list-style-type: none"> <li>• End Allocation Relationships with team and worker.</li> <li>• Ensure outstanding Activities are ended/abandoned</li> <li>• End Ongoing Service Provision Event – record outcome</li> <li>• Navigate to Person Details / File Details folder, Add file destruction date.</li> </ul>	Admin	<p><b>Ongoing Service Provision Event:</b></p> <ul style="list-style-type: none"> <li>• Outcome code = Completed</li> </ul> <p>Valid reason codes are:</p> <ul style="list-style-type: none"> <li>• Child care problems resolved</li> <li>• Child changed address</li> <li>• Child died</li> <li>• Child reached threshold age</li> </ul>

5. **Looked After Children Processes**

This process may be initiated at any stage in the Child in Need or Child Protection Process. The CareFirst Events can be recorded in parallel, where required to show multiple strands of work.

5.1 **Child becomes looked after – initial placement and change of placement /Change of legal status**

Step	Process	Action by	CareFirst Fields/Codes
1.	Decision made – child to be looked after	Unit Manager	
2.	Make necessary arrangements: <ul style="list-style-type: none"> <li>• Arrange suitable placement – obtain authorisation if agency foster placement or external residential placement.</li> </ul>	Allocated worker	
3.	Produce CareFirst LAC Forms <ul style="list-style-type: none"> <li>• Request Admin to create LAC forms</li> <li>• Create forms and save to G drive (work in progress folder)</li> <li>• Update forms &amp; circulate</li> </ul> Advise CPRU of need for review ( <a href="#">See to Section 5.8 LAC review process</a> ) <ul style="list-style-type: none"> <li>• Scan forms to CareStore</li> </ul>	Allocated worker Admin Allocated worker Admin	

Step	Process	Action by	CareFirst Fields/Codes
4.	Child placed <ul style="list-style-type: none"> <li>• Complete Data input form for placement and pass to Admin</li> </ul>	Allocated worker	

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>Update CareFirst</p> <ul style="list-style-type: none"> <li>If legal proceedings are required navigate to subject's MyCareFirst / Events screen and add Legal Proceedings Event</li> <li>If child is placed in a residential placement add a service agreement (placement codes P3, K1,K2,H5,R1, R3,R5,S1)</li> <li>Add LAC Episode</li> <li>Navigate to Ongoing Service Provision Event and Invoke Procedure "LAC Activities"</li> <li>Circulate data input form to relevant parties</li> <li>Notify other Local authority if child placed outside of Kirklees</li> </ul>	Admin	<p><b>Legal Proceedings Event:</b></p> <ul style="list-style-type: none"> <li>Context = Legal</li> <li>Type = Legal Proceedings</li> <li>Class= initial assessment/screening</li> </ul> <p><i>Note: Legal Proceedings Event will remain open if further legal proceedings are required – e.g. Interim Care order granted and work in hand to apply for full Care order.</i></p> <p><b>Service Agreements</b></p> <p>Service agreements for fostering and adoption cases (placement codes Q2, A3, A4, A5 and A6) will be added by the FPU Admin team.</p> <p>Placements with parents (placement code P1), friends/relative (placement code Q1), in hospital (placement code R2) and independent living placement code P2) do not require a service agreement.</p> <p><a href="#">Note: See Section 15 for a valid list of Service Types and Elements</a></p> <p style="text-align: right;"><b>Page 38 of 101</b></p> <p><b>The LAC Activities Procedure will include:</b></p> <ul style="list-style-type: none"> <li>Initial Health Ass't</li> <li>Personal Education Plan</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
6.	Placement or legal status to change: <ul style="list-style-type: none"> <li>If placement change go to step 7</li> <li>If legal status change go to step 9</li> </ul>		
7.	Make necessary arrangements: <ul style="list-style-type: none"> <li>Arrange suitable placement – obtain authorisation if agency foster placement or external residential placement.</li> </ul>	Allocated worker	
8.	Create CareFirst LAC Forms <ul style="list-style-type: none"> <li>Request Admin to create LAC forms</li> <li>Create forms and save to G drive (work in progress folder)</li> <li>Update forms &amp; circulate</li> <li>Scan forms to CareStore</li> </ul>	Allocated worker Admin Allocated worker Admin	
9.	Child placed and/or legal status changed <ul style="list-style-type: none"> <li>Complete Data input form for placement</li> </ul>	Allocated worker	
10.	Update CareFirst <ul style="list-style-type: none"> <li>If legal proceedings required navigate to subject's</li> </ul>	Admin	<b>Legal Proceedings Event:</b> <ul style="list-style-type: none"> <li>Context = Legal</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
	<p>MyCareFirst / Events screen and add Legal Proceedings Event (not S20 cases)</p> <ul style="list-style-type: none"> <li>If child placed in a residential placement add a service agreement (placement codes P3, K1,K2,H5,R1, R3,R5,S1)</li> <li>Add LAC Episode</li> <li>Navigate to Ongoing Service Provision Event and Invoke Procedure "LAC Activities"</li> <li>Circulate data input form to relevant parties</li> <li>Notify other Local authority if child placed outside of Kirklees</li> </ul>		<ul style="list-style-type: none"> <li>Type = Legal Proceedings</li> <li>Class = initial assessment/screening</li> </ul> <p><i>Note: Legal Proceedings Event will remain open if further legal proceedings are required – e.g. Interim Care order granted and work in hand to apply for full Care order.</i></p> <p><b>Service Agreements</b></p> <p>Service agreements for fostering and adoption cases (placement codes Q2, A3, A4, A5 and A6) will be added by the FPU Admin team.</p> <p>Placements with parents (placement code P1), friends/relative (placement code Q1), in hospital (placement code R2) and independent living placement code P2) do not require a service agreement.</p> <p><b>The LAC Activities Procedure will include:</b></p> <ul style="list-style-type: none"> <li>Initial Health Ass't</li> <li>Personal Education Plan</li> <li>Personal Education Plan Review</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
			<ul style="list-style-type: none"> <li>Stat Visit</li> </ul> (Note: if child is under 3 remove PEP activities at this stage)

5.2 **Make and record statutory visit**

Step	Process	Action by	CareFirst Fields/Codes
1.	Make statutory visit <ul style="list-style-type: none"> <li>Complete stat visit form</li> <li>Update CareFirst Observations</li> <li>Pass stat visit form to Admin</li> </ul>	Allocated worker	<b>Observations:</b> Subject = Statutory Visit
2.	Update CareFirst: <ul style="list-style-type: none"> <li>Navigate to subject's Activities Screen.</li> <li>Complete Statutory Review Activity</li> <li>Add Statutory review for next visit.</li> </ul>	Allocated worker	<b>Statutory Visit activity:</b> Class: C&F statutory visit Type: Stat visit Status: Completed Status date = date statutory visit made
3.	Stat visit form scanned to CareStore	Admin	

5.3 Arrange initial health assessment

Step	Process	Action by	CareFirst Fields/Codes
1.	<p>Arrange initial health assessment</p> <ul style="list-style-type: none"> <li>Complete initial health assessment form</li> <li>Arrange date for assessment with child health team team/LAC nurse</li> </ul>	Allocated worker	
2.	<p>Initial health assessment complete</p> <p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Complete initial health assessment activity</li> <li>Add health assessment review activity with due date of next assessment</li> <li>Navigate to subject's MyCareFirst/Classifications</li> <li>Add Classifications; health promotion, immunisation, dental check and substance misuse</li> <li>Update Professional relationship in My Client Network screen – GP and Dentist</li> <li>E-mail Allocated worker if changes made to GP or dentist information</li> </ul>	LAC Nurse Admin	<p><b>Initial Health Assessment activity:</b></p> <p>Class: C&amp;F reviews</p> <p>Type: Initial health assessment</p> <p>Status: Completed</p> <p>Status date = date health assessment completed</p> <p><b>Health Assessment Review activity:</b></p> <p>Class: C&amp;F reviews</p> <p>Type: Health assessment review</p> <p>Requested date: Today's date</p> <p>Required date: Scheduled date of next health assessment</p> <p>Status: Newly generated</p> <p>Status date = Today's date</p>

Step	Process	Action by	CareFirst Fields/Codes
			<b>Classifications:</b> Category = LAC Codes Classification = Dental checks Classification: Health promotion checks Classification: immunisations Classification: Substance misuse
3.	Completed IHA form emailed to allocated worker	LAC Nurse Admin	
4.	Copy IHA form to relevant parties	Allocated worker	
5.	Upload IHA to CareStore	Admin	

5.4

5.5 **Arrange subsequent health assessments**

Step	Process	Action by	CareFirst Fields/Codes
1.	<ul style="list-style-type: none"> <li>Daily checks of Desktop will show when Health Assessment due</li> </ul>	Allocated worker	

Step	Process	Action by	CareFirst Fields/Codes
2.	<p>Arrange assessment date</p> <ul style="list-style-type: none"> <li>Complete health assessment review form</li> <li>Arrange date for assessment with child health team team/LAC nurse</li> </ul>		
3.	<p>Health assessment review complete</p> <p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Complete health assessment review activity</li> <li>Add new health assessment review activity with due date of next assessment</li> <li>Navigate to subject's MyCareFirst/Classifications</li> <li>Add Classifications; health promotion, immunisation, dental check and substance misuse</li> <li>Update Professional relationship in My Client Network screen – GP and Dentist</li> <li>E-mail Allocated worker if changes made to GP or dentist information</li> </ul>	LAC Nurse Admin	<p><b>Health Assessment Review activity:</b></p> <p>Class: C&amp;F reviews</p> <p>Type: Health assessment review</p> <p>Status: Completed</p> <p>Status date = date health assessment review completed</p> <p><b>Health Assessment activity:</b></p> <p>Class: C&amp;F reviews</p> <p>Type: Health assessment review</p> <p>Requested date: Today's date</p> <p>Required date: Scheduled date of next health assessment</p> <p>Status: Newly generated</p> <p>Status date = Today's date</p>

Step	Process	Action by	CareFirst Fields/Codes
			<b>Classifications:</b> Category = LAC Codes Classification = Dental checks Classification: Health promotion checks Classification: immunisations Classification: Substance misuse
4.	Completed HA form emailed to allocated worker	LAC Nurse Admin	
5.	Copy HA form to relevant parties	Allocated worker	
6.	Upload HA to CareStore	Admin	

5.6 **Arrange for SDQ to be completed**

Step	Process	Action by	CareFirst Fields/Codes
1.	Arrange for SDQ to be completed	LAC Nurse Team/Child health Team	

2.	Completed SDQ received <ul style="list-style-type: none"> <li>• Details input to toolkit</li> <li>• Scores and print out sent to allocated worker</li> </ul>	LAC Nurse Admin	
3.	Update CareFirst: Navigate to CLA Episode screen. Add/update the SDQ score	LAC Nurse Admin	
4.	Scan scores and print out to CareStore	Admin	

5.7 **Arrange Initial PEP**

Step	Process	Action by	CareFirst Fields/Codes
1.	Arrange for completion of PEP	Allocated worker	
2.	Update CareFirst: <ul style="list-style-type: none"> <li>• Navigate to Worker desktop, open PEP Activity</li> <li>• Complete Activity</li> </ul>		<p><b>PEP Activities:</b></p> <p>Class = CYPS personal education plan</p> <p>Type = Personal education plan</p> <p>Status = Completed</p> <p>Status date: date PEP plan completed</p> <p><b>Note: (Leave the PEP Review Activity in place)</b></p>
3.	Scan PEP to CareStore	Admin	

5.8 **Arrange PEP Review**

Step	Process	Action by	CareFirst Fields/Codes
1.	Arrange PEP review meeting	Allocated worker	
2.	Update CareFirst: <ul style="list-style-type: none"> <li>Navigate to Worker desktop, open PEP Review Activity</li> <li>Complete Activity</li> <li>Add new Activity for Review of PEP</li> </ul>		<b>PEP Activities:</b> Class = CYPS personal education plan Type = PEP review

5.9 **LAC review process**

Step	Process	Action by	CareFirst Fields/Codes
1.	Arrange first review <ul style="list-style-type: none"> <li>Complete SR1 form and pass to CPRU admin</li> </ul>	Allocated worker	

Step	Process	Action by	CareFirst Fields/Codes
2.	Arrange review meeting <ul style="list-style-type: none"> <li>• Receive SR1 and arrange suitable date</li> <li>• Update CareFirst – go to Meetings Screen. Add 1 Month Stat Review</li> </ul>	CPRU Admin	<b>Meeting Details recorded:</b> <ul style="list-style-type: none"> <li>• Requested Date</li> <li>• Scheduled Date &amp; Time</li> <li>• Location</li> <li>• Chair</li> <li>• Responsible worker (= allocated worker)</li> </ul>
3.	Review meeting takes place	IRO	

Step	Process	Action by	CareFirst Fields/Codes
4.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>• Navigate to Meetings screen</li> <li>• Record actual date and time if different to scheduled date and time and reason meeting not held when planned</li> <li>• Record if child attended and method of participation</li> <li>• Add outcome and outcome reason</li> <li>• Add next meeting date if child remains LAC</li> </ul>	CPRU Admin	<p><i>Note: Professional Attendance is not recorded</i></p> <p><b>Reason meeting not held when planned:</b></p> <ul style="list-style-type: none"> <li>• Essential agency/professional unable to attend</li> <li>• Essential family unable to attend</li> <li>• New social worker</li> </ul> <p><b>Method of participation:</b></p> <ul style="list-style-type: none"> <li>• PN0 – Under 4</li> <li>• PN1 – Attends and speaks</li> <li>• PN2 – Attends, advocate speaks</li> <li>• PN3 – Attends, symbols</li> <li>• PN4 – attendance without contribution</li> <li>• PN5 – Not attends, briefs advocates</li> <li>• Not attend distance communication</li> <li>• Not attended, no views</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>If Child is no longer to be Looked After</p> <ul style="list-style-type: none"> <li>Update the LAC Meeting with the appropriate outcome.</li> </ul>		<p>If a child ceases to be looked after at any other stage of the process the allocated SW rings the IRO and the IRO informs CPRU Admin who then abandons the scheduled LAC review meeting.</p>

5.10 **Leaving Care**

The Leaving Care team are responsible for maintaining the young person's review records and CarePlace record in CareFirst after the case has transferred to them. The process is the same as for cases held by the LAC team.

Step	Process	Action by	CareFirst Fields/Codes
1.	Child is transferred to Leaving Care Team	LAC Team	This may be part of the LAC review process
2.	<p>Arrange case transfer to Leaving Care Team</p> <ul style="list-style-type: none"> <li>Prepare transfer summary</li> <li>Hold Allocation Meeting</li> <li>Agree date of transfer</li> </ul>	<p>LAC team managers / Leaving Care team managers</p>	

Step	Process	Action by	CareFirst Fields/Codes
3.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Navigate to subject MyClient screen.</li> <li>Reassign On-going Services Event to Leaving Care Team.</li> <li>Reassign health check / PEP Activities to Leaving Care Team</li> <li>Update Allocation Relationships – end LAC SW involvement, Add Allocation to Leaving Care Team</li> </ul>	Manager or LAC Team Admin	
4.	<p>Allocate case to worker</p> <p>Update CareFirst</p> <ul style="list-style-type: none"> <li>Navigate to subject's MyClient. Reassign Service Provision Event to worker</li> <li>Add Allocation Relationship with worker (primary worker)</li> </ul>	Manager	
5.	Arrange assessment of Needs at age 16+ and create pathway plan	Allocated Worker	Not recorded in CareFirst at present

Step	Process	Action by	CareFirst Fields/Codes
6.	CareFirst Update: Complete Pathway Plan activity	Allocated Worker	<b>Pathway plan activity:</b> Class: C&F pathway plan Type: pathway plan Status: Completed Status date = date plan completed
7.	Update pathway plan after review		
8.	Young person ceases to be looked after <ul style="list-style-type: none"> <li>Update LAC Episode – end legal status and placement.</li> <li>End Service Agreement (where applicable)</li> <li>Update Main Address.</li> <li>Navigate to subject's MyClient. Open On-going Services Event. Enter outcome. Add 'Maintaining Services' Event. Assign to Personal Advisor</li> <li>Go to My Client Network, amend primary worker allocation from social worker to personal advisor</li> <li>Add/update Service Agreements for services/accommodation</li> </ul>	Manager/Admin	<b>On-Going Services Event:</b> <ul style="list-style-type: none"> <li>Outcome = Completed</li> <li>Reason = Maintaining contact required</li> </ul> <b>Maintaining Services Event:</b> <ul style="list-style-type: none"> <li>Context = Leaving Care</li> <li>Type = Maintaining Contact</li> <li>Class= initial assessment/screening</li> </ul> <p>If the young person remains residing with a foster carer or in supported lodgings a new service agreement will be required. <i>Note: See Section 15 for Valid list of Service Types and Elements</i></p>

Step	Process	Action by	CareFirst Fields/Codes
9.	Record Activity and Observation as and when contact made with young person	Personal Advisor	<b>Maintaining Contact Activity:</b> <ul style="list-style-type: none"> <li>• Class = C&amp; F Maintaining contact (care leavers)</li> <li>• Type = Tracking</li> </ul>
10.	Arrange contact at age 19 <ul style="list-style-type: none"> <li>• Update CareFirst – using Care Leavers screen</li> </ul>		<b>Care Leavers Details to be recorded:</b> <ul style="list-style-type: none"> <li>• Whether the local authority has been in touch with the child</li> <li>• Main activity</li> <li>• Accommodation on 19th birthday</li> <li>• Suitability of accommodation</li> </ul>
11.	Case closure / transfer Standard procedures apply when case is closed, or transferred to Adult Services.		

5.10.1 Other LA Leaving Care child residing in Kirklees

Step	Process	Action by	CareFirst Fields/Codes
1.	Letter received by Leaving Care Team	Leaving Care Team	
2.	Check CareFirst: <ul style="list-style-type: none"> <li>• If not known add new person record</li> <li>• Add relationship to responsible/notifying LA</li> <li>• Add classification</li> </ul>	Manager	<b>Person Record:</b> Role = Other  <b>Professional Relationship:</b> Type = Notifying LA  <b>Classification:</b> Category = OLA responsible Classification = OLA leaving care
3.	Scan letter to Care Store	Admin	
4.	When leaving care services no longer required: <ul style="list-style-type: none"> <li>• End professional relationship</li> <li>• End classification</li> </ul>	Manager	

## 6. Child Protection Processes

**Note:** Child protection processes can be invoked at any point in the case. Whilst the child protection discussions and investigations have to be 'fast tracked' to protect the child, the guidance requires that a referral and initial assessment must be recorded. The latter may be very brief, simply recording the necessary details to show that the strategy discussion was required. In practice these steps may be need to be recorded retrospectively.

**Note:** These process flow charts refer to a 'child'. It is expected that in line with good practice recording all children in a sibling group who are the subject of child protection concerns will have a complete record in CareFirst as the case progresses. This is to ensure that other practitioners and admin staff can be immediately aware of the case status. This will not be achieved in Kirklees until CareAssess is implemented.

### 6.1 Initiate child protection enquiries and investigation

The steps in this process may vary slightly for current open cases, and particularly where the allegation is made against a carer by a child in a placement.

Note: The person who is carrying out CP work and/or updating CareFirst may change depending on circumstances in line with current practice.

Step	Process	Action by	CareFirst Fields/Codes
1.	Child protection concerns identified on new, case. Make Manager aware of the case.	Any worker	

Step	Process	Action by	CareFirst Fields/Codes
2.	<p>Initiate a strategy discussion. Record details in the Assessment record (D&amp;A) or the S4 7 enquiry document (other units).</p> <p>If EDS have initiated the Strategy Discussion – their contact sheet will provide the details to be recorded retrospectively.</p>	Allocated Worker	
3.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Add Strategy Discussion Event,</li> </ul>	Admin	<p><b>Strategy Discussion Event:</b></p> <ul style="list-style-type: none"> <li>Context = CP Strategy Discussion</li> <li>Type = Strategy Discussion</li> <li>Class = Full assessment and review</li> </ul> <p>Note: There may be more than one strategy discussion and all should be recorded</p>

Step	Process	Action by	CareFirst Fields/Codes
4.	<p>Determine if child may be at risk of significant harm:  <b>Yes – initiate core assessment and S47 enquiries</b></p> <p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>• Record outcome of Strategy Discussion in the Event.</li> <li>• Add S47 Enquiries Event</li> <li>• Add Core Assessment Event (if not already in progress and recorded)</li> </ul> <p><b>No – revert to standard referral processes, or current open case status.</b></p> <ul style="list-style-type: none"> <li>• Record outcome of Strategy Discussion in the Event.</li> <li>• End of this Process</li> </ul>	<p>Allocated worker/Manager</p>	<p><b>Strategy Discussion Event:</b></p> <ul style="list-style-type: none"> <li>• Outcome = Complete</li> <li>• Reason Codes: <ul style="list-style-type: none"> <li>• Section 47 required</li> <li>• Core Assessment required</li> <li>• Referred to other agency</li> <li>• Referred to other agency-CAF recommended</li> <li>• No further action required</li> <li>• Information/advice provided</li> </ul> </li> </ul> <p><b>S47 Event:</b></p> <ul style="list-style-type: none"> <li>• Context = Child protection</li> <li>• Type = Section 47 enquiry</li> <li>• Class = CP Investigation</li> </ul>
5.	<p>Undertake S47 enquiries as part of core assessment.</p> <p>Record evidence and findings in assessment record (D&amp;A) or the S4 7 enquiry document (other units).</p>	<p>Allocated worker</p>	

Step	Process	Action by	CareFirst Fields/Codes
6.	<p>Determine if Child is at risk of significant harm:</p> <ul style="list-style-type: none"> <li>Concerns substantiated – continuing risk – CP conference required. Alert CPRU</li> <li>Concerns substantiated – no continuing risk – revert to CiN referral*</li> <li>Concerns not substantiated – revert to CiN referral</li> </ul> <p>*Unit Manager must agree this outcome</p>	Worker/Manager	<p>In a very small number of cases the outcome may be NFA and case closed.</p> <p>In practice the call to CPRU to arrange a CP conference can be made as soon as it becomes clear that one is required. This maximises the time available to convene the conference.</p>
7.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Record outcome of S47 Enquiries in event.</li> </ul>	Admin	<p><b>S47 Enquiries Event:</b></p> <ul style="list-style-type: none"> <li>Outcome Codes: <ul style="list-style-type: none"> <li>Concerns are not substantiated</li> <li>Concerns substantiated, no continuing risk</li> <li>Concerns substantiated, continuing risk</li> </ul> </li> <li>Reason Codes: <ul style="list-style-type: none"> <li>Evidence of abuse/risk to Child</li> <li>No evidence of risk to the Child</li> <li>Risk unlikely to reoccur</li> </ul> </li> </ul> <p><i>Note: the core assessment event may remain open</i></p>

Step	Process	Action by	CareFirst Fields/Codes
			<i>as the work may be on going.</i>
8.	If CP conference is required, liaise with CPRU, send an invitation list and prepare social worker's report to conference	Allocated worker	

6.2 **Arrange initial child protection conference**

Step	Process	Action by	CareFirst Fields/Codes
1.	Receive notification that a child protection conference is required and an invitation list	CPRU admin	
2.	Allocate IRO to case	Manager	
3.	Update CareFirst. <ul style="list-style-type: none"> <li>Go to Network via My Client. Add Professional Relationship of IRO to child</li> </ul>	CPRU admin	
4.	Arrange conference: Email allocated worker with date	CPRU admin	

Step	Process	Action by	CareFirst Fields/Codes
5.	Update CareFirst: <ul style="list-style-type: none"> <li>Add Initial CP Conference Meeting record</li> <li>Record subjects of Meeting</li> </ul>	CPRU admin	<b>Conference Details recorded:</b> <ul style="list-style-type: none"> <li>Planned date &amp; time</li> <li>Location</li> <li>Invitees</li> <li>Reports requested</li> <li>Subjects of meeting</li> </ul>
6.	Produce and send invitations, scan to CareStore	CPRU admin	
7.	Receive SW conference report, pass to IRO	CPRU Admin	
8.	Hold initial child protection conference <ul style="list-style-type: none"> <li>Child to become subject to CP plan</li> <li>Child not to be subject of CP plan – revert to CiN process</li> </ul>	IRO	
9.	Update CareFirst: <ul style="list-style-type: none"> <li>Record conference outcome for each child in the CP conference screen</li> <li>If child is subject of a CP plan Add the proposed</li> </ul>	CPRU Admin	<b>CP Conf Outcomes:</b> <ul style="list-style-type: none"> <li>Conference Adjourned</li> <li>Conference Cancelled</li> <li>CP plan no longer required</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
	<p>date of the review conference</p> <ul style="list-style-type: none"> <li>• Add minimal CP plan</li> <li>• Enter category of abuse in plan</li> </ul>		<ul style="list-style-type: none"> <li>• Conference entered in error</li> <li>• Child NOT to be subject of a CP plan</li> <li>• Child to be subject of a CP plan</li> <li>• CP plan to continue</li> <li>• Split from Conference</li> </ul> <p><b>CP Plan:</b></p> <ul style="list-style-type: none"> <li>• Context = CP</li> <li>• Type = Child protection plan</li> <li>• Goal = Protect from harm</li> <li>• Date = CP conference date</li> <li>• Category of Abuse (emotional abuse, neglect, sexual abuse, physical abuse, multiple)</li> </ul> <p>By adding a CP Plan, a warning will automatically be recorded against the child</p>

Step	Process	Action by	CareFirst Fields/Codes
10.	<p>Complete admin tasks:</p> <ul style="list-style-type: none"> <li>• Inform agencies of CP plan (where appropriate)</li> <li>• Produce and distribute chair's summary</li> <li>• Update conference diary book</li> <li>• Record and finalise minutes of conference, upload to CareStore</li> </ul>		

6.3 **Arrange child protection review conference**

Step	Process	Action by	CareFirst Fields/Codes
1.	Monitor forthcoming conferences via the conference diary book	CPRU admin	
2.	Send allocated worker conference reminder one month before conference		
3.	Receive core group report before conference		
4.	The same process as for the initial CP conference should be followed thereafter. <a href="#">See Section 6.2 – arrange initial CP conference</a>		

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>After the conference if the child is no longer subject to a CP plan update CareFirst:</p> <ul style="list-style-type: none"> <li>Record the outcome of the conference in the CP conference screen</li> <li>Enter an end date in the child protection plan</li> </ul>		<p><b>CP Conf Outcomes:</b></p> <ul style="list-style-type: none"> <li>Conference Adjourned</li> <li>Conference Cancelled</li> <li>CP plan no longer required</li> <li>Conference entered in error</li> <li>Child NOT to be subject of a CP plan</li> <li>Child to be subject of a CP plan</li> <li>CP plan to continue</li> <li>Split from Conference</li> </ul> <p><b>CP Plan:</b></p> <p>End date = Date of CP conference</p> <p>Outcome = Completed</p> <p><b>Reasons :</b></p> <ul style="list-style-type: none"> <li>Attained 18 years</li> <li>Deceased</li> <li>Moved out of Kirklees</li> <li>No longer at risk – remains in care of person with parental responsibility</li> <li>No longer at risk – now LAC</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
			<b>Note: By Ending the CP Plan the warning indicator will also automatically be ended.</b>

6.4 Enquiries regarding children subject to a child protection plan

Step	Process	Action by	CareFirst Fields/Codes
1.	Receive enquiry from practitioner/ other agency <ul style="list-style-type: none"> <li>Determine if a register/child protection check is required.</li> </ul>	CPRU admin	
2.	Search CareFirst. <ul style="list-style-type: none"> <li>If child is not known, Add person record, with role of O for Other</li> <li>Go to Logged CP enquiries screen. Check details and record current enquiry</li> <li>If outside agency pass results to IRO</li> <li>If CYP staff – provide information</li> </ul>		Searching Rules: To avoid creating duplicated records please ensure you carry out at least 3 separate searches: name, address and age range if the name of the child, the address and approximate age is known. If only the name of the child is known then at least 2 searches should be undertaken to take account of unusual names/spellings.  Use of the Logged Enquiry Screen will: <ul style="list-style-type: none"> <li>List any Child Protection Plans for the child</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
			<p>together with the category of abuse</p> <ul style="list-style-type: none"> <li>• List any other household members who are subject to a CP Plan, together with details of their key worker</li> <li>• List any Child Protection Registrations for a specific child, showing the category of abuse and the start and end dates of registrations. If a Registration was temporary, the reason why will also be shown.</li> <li>• List any S47 Enquiries or case conferences that have taken place in relation to the child about whom the enquiry is being made</li> <li>• List details of any previous enquiries made of the Child Protection Register in relation to a specific child. The detail of previous register enquiries may be viewed, but not updated. However, the Outcome of a Register enquiry may be updated using the Unlogged CP Enquiry screen</li> </ul> <p>By recording a Logged Enquiry a CareFirst message will automatically be sent to the Allocated Worker of the child and allocated worker of any other children</p>

Step	Process	Action by	CareFirst Fields/Codes
			<p>living at the same address.</p> <p>If 2 or more enquiries are logged about the same child a CareFirst message will automatically be sent to the CPRU Manager.</p> <p>Use of the UnLogged Enquiry Screen:</p> <ul style="list-style-type: none"> <li>• This screen enables users to query the Child Protection status of a specific child without forcing a record of the enquiry to be created.</li> <li>• This function is designed only for those administering the Child Protection system.</li> <li>• This screen will display the same information as the Logged Enquiry screen</li> </ul>
3.	<p>Provide agency with advice - either</p> <ul style="list-style-type: none"> <li>• The result of the CP check</li> <li>• The reason why a check is not appropriate</li> <li>• Confirm advice in writing and save letter to CareStore.</li> </ul>	IRO	

Step	Process	Action by	CareFirst Fields/Codes
4.	CareFirst message re enquiries received	Allocated worker/CPRU Manager	

7. **Emergency Duty Service**

Step	Process	Action by	CareFirst Fields/Codes
1.	Contact received by telephone If social work involvement is required go to step 3 If EDS is not involved – no record kept – end of process	Helpline	
2.	Take basic information on paper	EDS officer	
3.	Check if subject is known to social services: <ul style="list-style-type: none"> <li>• Check EDS card system</li> <li>• Search CareFirst</li> <li>• Check current records G: Drive</li> <li>• Check CareStore</li> </ul>		

Step	Process	Action by	CareFirst Fields/Codes
4.	<p>Analyse information gathered.</p> <ul style="list-style-type: none"> <li>Add summary of involvement to card</li> <li>If known to CareFirst and case currently open (open event) go to step 5</li> <li>If not known to social services, complete and send contact sheet to Duty and Assessment.</li> </ul>		
5.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>Navigate to Subject's MyCareFirst/Observation screen.</li> <li>Add Observation and Save.</li> <li>Automatic CareFirst message sent to Allocated Worker</li> </ul>		Observation Subject = EDS Involvement

8. **Access to Record Requests**

Step	Process	Action by	CareFirst Fields/Codes
1.	Request for information received (in writing)	Data Protection Officer	

Step	Process	Action by	CareFirst Fields/Codes
2.	<p>Update CareFirst:</p> <ul style="list-style-type: none"> <li>From Worker desktop search CareFirst.</li> <li>Go to subject's MyClient</li> <li>Add and outcome Initial Contact</li> <li>Add Access to Records Event</li> <li>Assign Event to appropriate team (current team is open case, Adoption team if birth record request, LAC team if closed LAC case)</li> </ul>	Admin	<p><b>Initial Contact:</b></p> <ul style="list-style-type: none"> <li>Topic = C – request for information</li> <li>Presenting issue = access to records</li> <li>Outcome = C- passed to CYPS safeguarding</li> </ul> <p><b>Access to Records Event:</b></p> <ul style="list-style-type: none"> <li>Context = access to records</li> <li>Types: <ul style="list-style-type: none"> <li>access to records</li> <li>Schedule 2</li> <li>Intermediary counselling</li> </ul> </li> <li>Class = initial assessment/screening</li> </ul> <p>Schedule 2 and intermediary counselling to only be used for adoption cases.</p>
3.	<p>Check CareFirst Team Desktop to identify new requests for access to records (open Access to Records Event).</p> <p>Allocate case and update CareFirst</p> <ul style="list-style-type: none"> <li>Assign Event to Worker</li> <li>Allocate to Team and Worker (primary worker) via My Client Network Screen</li> </ul>	Team manager	

Step	Process	Action by	CareFirst Fields/Codes
4.	Locate and provide information	Allocated worker	
5.	Update CareFirst <ul style="list-style-type: none"> <li>• Record the Event outcome (Completed)</li> <li>• Record the Reason (Advice/information provided)</li> <li>• End team and worker allocation</li> </ul>	Admin	

9. **Recording Missing Children from other LAs**

Step	Process	Action by	CareFirst Fields/Codes
1.	Receive notification of missing child from other local authority (usually via e-mail).  Check child meets criteria for inclusion in CareFirst (e.g. has CP plan, is LAC, unborn child at risk)	CPRU Manager	

Step	Process	Action by	CareFirst Fields/Codes
2.	<p>Check CareFirst.</p> <ul style="list-style-type: none"> <li>If not known Add person record with role of Missing</li> <li>Add Relationship with other LA</li> </ul> <p>Upload e mail to CareStore</p>	CPRU Admin	<p><b>Person Record:</b> Role = Missing</p> <p><b>Address:</b></p> <ul style="list-style-type: none"> <li>Add the general address of CHECK (in the postcode field)</li> <li>Add the actual address in the address notes field</li> </ul> <p><b>Professional Relationship:</b> Type = Notifying LA</p> <p><i>Note: Family members are not recorded.</i></p>
3.	Distribute information to other agencies (on a weekly basis).		
4.	<p>If found:</p> <p>Update role in CareFirst to 'other'</p>		<p><b>Person Record:</b> Role = Other</p>

10. Private Fostering

Step	Process	Action by	CareFirst Fields/Codes
1.	Notification Received		
2.	Check/Update CareFirst: <ul style="list-style-type: none"> <li>• If not known, add new person record</li> <li>• Add Initial Contact</li> <li>• Add Contact Evaluation Event</li> </ul>	Admin	<b>Initial Contact:</b> <ul style="list-style-type: none"> <li>• Topic = C-request for service</li> <li>• Presenting Issue = Private fostering notification</li> <li>• Outcome = C-passed to CYPS safeguarding</li> </ul> <b>Contact Evaluation Event:</b> <ul style="list-style-type: none"> <li>• Assigned to the D&amp;A allocation team code (CYPDASAL)</li> </ul>
3.	Contact received by Duty – statutory enquiries made		

Step	Process	Action by	CareFirst Fields/Codes
4.	Update CareFirst: <ul style="list-style-type: none"> <li>• Add Relationship between child and carer</li> <li>• Add Classification</li> <li>• Update Contact <b>Evaluation</b> Event</li> <li>• Add PF Event and Activity</li> </ul>		<b>Contact Evaluation Event:</b> <ul style="list-style-type: none"> <li>• Outcome = Completed</li> <li>• Reason = Passed on as a referral</li> </ul> <b>Personal Relationship:</b> <ul style="list-style-type: none"> <li>• Type = Privately Fostered By</li> </ul> <b>Classification:</b> <ul style="list-style-type: none"> <li>• Category = Private Fostering</li> <li>• Classification = Place of Birth</li> </ul> <b>Private Fostering Event:</b> <ul style="list-style-type: none"> <li>• Context = Private fostering</li> <li>• Type = Private fostering placement</li> <li>• Class = Full assessment &amp; review</li> </ul> <b>Private Fostering Activity:</b> <ul style="list-style-type: none"> <li>• Class = CYPS private fostering</li> <li>• Type = Private fostering initial visit</li> </ul>
5.	Carry out Initial Visit Update CareFirst: <ul style="list-style-type: none"> <li>• End Initial Visit Activity with date visit took place</li> </ul>		

Step	Process	Action by	CareFirst Fields/Codes
6.	Notification of Placement to End received Update CareFirst: <ul style="list-style-type: none"> <li>Add Activity</li> </ul>		<b>Placement to End Activity:</b> <ul style="list-style-type: none"> <li>Class = CYPS private fostering</li> <li>Type = End notification received</li> </ul> Complete with Date Received
7.	Placement Ends: Update CareFirst: <ul style="list-style-type: none"> <li>End Event</li> <li>End Relationship</li> </ul>		

11. **Other LA Children residing in area either LAC or subject to CP Plan**

Step	Process	Action by	CareFirst Fields/Codes
1.	Notification Received		

Step	Process	Action by	CareFirst Fields/Codes
2.	<p>Check CareFirst:</p> <ul style="list-style-type: none"> <li>• If not known add new person record</li> <li>• Add relationship to responsible/notifying LA</li> <li>• Add classification</li> </ul>	Manager	<p><b>Person Record:</b> Role = Other</p> <p><b>Professional Relationship:</b> Type = Notifying LA</p> <p><b>Classification:</b> Category = OLA responsible Classification = OLA LAC or OLA CP Plan</p>
5.	Scan letter to Care Store	Admin	
6.	<p>When notified child has left the area:</p> <ul style="list-style-type: none"> <li>• End professional relationship</li> <li>• End classification</li> </ul>	Admin	

## 12. CaseClosure

The following section details all areas to be checked and updated at Case Closure

Step	CareFirst Fields/Codes
1.	<p><b>My Client – Network:</b> End all Allocation Relationships</p> <p><b>File Details:</b> Add Destruction Date There is a data retention/file destruction policy that all staff should be aware of</p> <p><b>Key Classifications:</b> Check validity of open Key Classifications</p> <p><b>Open Assignments:</b> End all Open Events, Activities and Assessments Check any other open assignments e.g. Meetings or Conferences – contact CPRU if still open</p> <p><b>Observations:</b> Check if any observations have not been completed and complete or inform originating worker as appropriate</p> <p><b>Service Agreements:</b></p> <p><b>Messages:</b> Complete all new messages Archive all Completed Messages</p>

### 13. Children with Disabilities Service Processes

The Children with Disabilities Service has been piloting E-Forms for ICS using MyCareFirst with CareFirst v5. This section of the handbook describes their revised processes using CareFirst 6.

**Note:** Where child protection concerns are identified the child protection process will be initiated. When there is an urgent need to accommodate a child the Looked After process will be initiated.

#### Contact & referral process

##### 13.1.1 Written Contacts

Step	Process	Action by	CareFirst Fields/Codes
1.	Contact is received (letter or FAX)	Admin	
2.	Check CareFirst. Is child known to social services? <ul style="list-style-type: none"> <li>• From Worker desktop/Find people search for child.</li> <li>• If a current open case go to step 3</li> <li>• If closed or not known go to step 4</li> </ul>		

Step	Process	Action by	CareFirst Fields/Codes
3.	<p>Scan paperwork as required for CareStore</p> <p>If Domestic Violence Notification or EDS notification put copy doc in manager's pigeon hole and E-mail allocated worker.</p> <p>Put original doc in allocated worker's pigeonhole.</p>		
4.	<p>If child is not known to CareFirst:</p> <ul style="list-style-type: none"> <li>• Add person record</li> </ul> <p>If child is known/closed or non-client:</p> <ul style="list-style-type: none"> <li>• Check and update biographical details</li> <li>• Go to Person Details / roles ensure current role includes C = Client</li> </ul> <p>For all cases:</p> <ul style="list-style-type: none"> <li>• Add and outcome an Initial Contact</li> <li>• Add a Contact Evaluation Event</li> <li>• Add Team Allocation to Team 1 (CFCWDT1)</li> <li>• Put original doc in deputy's tray.</li> </ul>		<p><b>Person Record:</b></p> <ul style="list-style-type: none"> <li>• Role = C - client of social services</li> <li>• Gender, DOB and ethnicity should always be added. Religion and 1<sup>st</sup> language are optional</li> </ul> <p>Searching Rules:</p> <p>To avoid creating duplicated records please ensure you carry out at least 3 separate searches: name, address and age range if the name of the child, the address and approximate age is known. If only the name of the child is known then at least 2 searches should be undertaken to take account of unusual names/spellings.</p> <p><b>Initial Contact:</b></p> <p>For domestic violence contacts:</p>

Step	Process	Action by	CareFirst Fields/Codes
			<ul style="list-style-type: none"> <li>• Presenting Issue = domestic violence</li> <li>• If the contact is a DV notification the initial contact topic = C-notification</li> <li>• If the contact is a DV referral the initial contact topic = c-request for service</li> </ul> <p>For all initial contacts the outcome is C – passed to CYPS safeguarding</p> <p><b>Event Context:</b> ICS</p> <p><b>Event Type:</b> Contact Evaluation Allocation = allocated team</p> <ul style="list-style-type: none"> <li>•</li> </ul>
5.	See Section 13.1.2 step 2 – search for new contacts requiring action		

13.1.2 Telephone contacts and referrals from panel

Step	Process	Action by	CareFirst Fields/Codes
1.	Receive contact (Initial Contact and Contact Evaluation Event will have been added by SSIPS)	Referral & Advice Officer	
2.	Search for new Contacts requiring action: <ul style="list-style-type: none"> <li>Navigate to worker/team desktop / caseload</li> <li>Identify new Contact Evaluation Events</li> <li>Open Event and update priority to (RC if SSIPS took the contact)</li> <li>Assign Event to worker</li> </ul>		
3.	Check case history for previous involvement: <ul style="list-style-type: none"> <li>MyClient / Chronology and Network</li> </ul>		
4.	Complete and file standard 'paperwork' e.g. contact/ref form Locate previous file. <ul style="list-style-type: none"> <li>Record information and actions in Observations</li> </ul> Hold discussion with manager		
5.	Add / update File Details ESCR marker		

Step	Process	Action by	CareFirst Fields/Codes
6.	Update CareFirst: Add Professional Relationships and Family network Ensure family members are fully cross referenced		
7.	Add and complete E-Form: <ul style="list-style-type: none"> <li>Navigate to subject desktop / Find Assessments</li> <li>Add Additional Contact Details Form</li> <li>Enter details of contact, complete and save E-Form</li> </ul>		Authorisation Activity is triggered to team manager
8.	Determine outcome of Contact: <ul style="list-style-type: none"> <li>Check and authorise Contact Form</li> <li>Complete authorisation Activity</li> <li>If the outcome is NFA – case closed go to step 9</li> <li>If the outcome is Referral Required - <a href="#">See Section 13.1.3 – referral record</a></li> </ul>	Team Manager	If the outcome is NFA – case closed – then Activities will be triggered for the following: <ul style="list-style-type: none"> <li>Advise referrer of outcome – Ref and advice</li> <li>Record file destruction date – assigned to Admin</li> </ul> If the outcome is Referral – then the Referral Evaluation Form and Key Information Form will be triggered, Assigned to the CWD team. A Referral Evaluation Event is automatically Added.
9.	To update CareFirst when a case is closing <a href="#">See Section 12 – case closure</a>	Admin	

13.1.3 Record referral

Step	Process	Action by	CareFirst Fields/Codes
1.	Assign E-Forms to worker: <ul style="list-style-type: none"> <li>Referral Evaluation</li> <li>Key Information Record</li> </ul>	Manager	
2.	Complete checks (e.g. CP and LAC) <ul style="list-style-type: none"> <li>Enter data in Key Information Record. Complete and save Form</li> <li>Enter data in Referral Evaluation Form. Complete and save Form</li> </ul>		Authorisation Activity is triggered to team manager
3.	Determine outcome of Referral: <ul style="list-style-type: none"> <li>Check and authorise Referral Evaluation Form</li> <li>Complete authorisation Activity</li> <li>If the outcome is NFA – case closed go to step 5</li> </ul> If the outcome is Initial Assessment <a href="#">See Section 13.2 – initial and core assessment process</a>		The Referral Evaluation Event is ended If the outcome is NFA – case closed – then Activities will be triggered for the following: <ul style="list-style-type: none"> <li>Advise referrer of outcome – Ref and advice</li> <li>Record file destruction date – assigned to Admin</li> <li>If the outcome is Initial Assessment then the E-Form for Initial Assessment is triggered, Assigned to the CWD Team</li> </ul>

Step	Process	Action by	CareFirst Fields/Codes
4.	To update CareFirst when a case is closing <a href="#">See Section 12 – case closure</a>		

13.2 Initial and core assessment process

13.2.1 Initial assessment

Step	Process	Action by	CareFirst Fields/Codes
1.	Hold Duty Meeting. Determine allocation of new cases	Team Manager	
2.	Update CareFirst: <ul style="list-style-type: none"> <li>• Navigate to Team Desktop / Caseload</li> <li>• Reassign Initial Assessment to duty worker</li> </ul>		The Initial Assessment Event will automatically be reassigned to the worker.
3.	Update CareFirst: <ul style="list-style-type: none"> <li>• Navigate to subject's MyCareFirst</li> <li>• Add Allocation Relationship</li> </ul>	Duty worker	Allocation = Primary Worker
4.	Undertake Initial Assessment. Discuss outcome with Manager. <ul style="list-style-type: none"> <li>• Record evidence and findings in Initial Assessment E-Form</li> <li>• Complete and Save the assessment</li> </ul>		An Activity to authorise the assessment is triggered to the Team Manager

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>Agree outcome of Initial Assessment:</p> <ul style="list-style-type: none"> <li>• Check and authorise Initial Assessment Form</li> <li>• Complete authorisation Activity</li> <li>• If the outcome is NFA – case closed go to step 6</li> </ul> <p>If the outcome is Core Assessment - <a href="#">See Section 13.2.2 – core assessment</a></p>	Team Manager	<p>On authorisation, the Initial Assessment Event is ended.</p> <p>If the outcome is NFA – case closed – then Activities will be triggered for the following:</p> <ul style="list-style-type: none"> <li>• Advise referrer of outcome – Social Worker</li> <li>• Record file destruction date – Admin</li> </ul> <p>If the outcome is core assessment then the following are triggered, assigned to the CWD Team.</p> <ul style="list-style-type: none"> <li>• Core Assessment E-form</li> <li>• CareAssess core assessment Event</li> <li>• Outcome Meeting Activity.</li> </ul>
6.	<p>To update CareFirst when a case is closing <a href="#">See Section 12 – case closure</a></p>	Admin	

13.2.2 Core assessment

Step	Process	Action by	CareFirst Fields/Codes
1.	Allocate worker and update CareFirst: <ul style="list-style-type: none"> <li>Navigate to Team Desktop – Reassign core assessment to allocated worker</li> </ul>	Team Manager	
2.	Update CareFirst: <ul style="list-style-type: none"> <li>Navigate to subject's MyClient/Relationships screen</li> <li>Add Allocation Relationships for Worker and Team</li> </ul>	Allocated Worker	Allocation = primary worker Allocation = allocated team
3.	Undertake core assessment: <ul style="list-style-type: none"> <li>Hold planning meeting</li> <li>Complete AFAS scoring matrix (G:Drive)</li> <li>Discuss decisions with Manager</li> <li>Hold outcome meeting and decide if services are going to be provided – who is going to be responsible for managing Child in Need Plan</li> </ul>		
4.	Update CareFirst: <ul style="list-style-type: none"> <li>Enter evidence and findings in core assessment record</li> <li>Complete and Save Form</li> </ul>		An Activity to authorise the assessment is triggered to the Team Manager.

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>Agree outcome of core assessment:</p> <ul style="list-style-type: none"> <li>• Check and authorise core Assessment Form</li> <li>• Complete authorisation Activity</li> <li>• If the outcome is NFA – case closed go to step 6</li> <li>• If the outcome is services provided <a href="#">See Section 13.3 – CiN planning and service provision</a></li> </ul>	Team manager	<p>On authorisation core assessment Event is ended.</p> <p>If the outcome is NFA – case closed – then Activities will be triggered for the following:</p> <ul style="list-style-type: none"> <li>• Advise referrer of outcome – Social worker</li> <li>• Record file destruction date – Admin</li> </ul> <p>If the outcome is provide services then:</p> <ul style="list-style-type: none"> <li>• The Child in Need Plan Form is triggered, assigned to the CWD team.</li> </ul>
6.	To update CareFirst when a case is closing <a href="#">See Section 12 – case closure</a>	Admin	

13.3 CiN planning and service provision

Step	Process	Action by	CareFirst Fields/Codes
1.	Update CareFirst: <ul style="list-style-type: none"> <li>• Add CiN Plan Form</li> <li>• Record CiN Plan review Activity if retaining responsibility (newly generated) in the Form</li> <li>• Add Lead professional Relationship if other agency taking responsibility for Plan</li> </ul>	Allocated Worker	The CiN review Activity is added in the CiN Plan and updates CareBase on completion.
2.	Update CareFirst: <ul style="list-style-type: none"> <li>• Add CiN Plan Form</li> <li>• Record CiN Plan review Activity (completed ) in the Form</li> <li>• Record lead professional in the Form</li> </ul>		Lead Professional is a Relationship question in the CIN plan assessment
3.	Authorise care plan: <ul style="list-style-type: none"> <li>• Check and authorise CiN Care Plan Form</li> <li>• Complete authorisation Activity</li> </ul>	Team Manager	
4.	Print CiN plan and distribute to child, parents and other agencies.	Allocated Worker	

Step	Process	Action by	CareFirst Fields/Codes
5.	<p>If CWD is to manage the plan</p> <ul style="list-style-type: none"> <li>Add On-Going Services Event Assigned to T1</li> <li>arrange transfer to T2 or T3 team – go to step 7</li> </ul> <p>If CWD is not managing the plan</p> <ul style="list-style-type: none"> <li>Close case. Go to step 6</li> </ul>	Team Manager	Kirklees agreed with other agencies they would write up the plan even if they are not going to manage it
6.	To update CareFirst when a case is closing <a href="#">See Section 12 – case closure</a>	Admin	
7.	<p>Case transfer:</p> <ul style="list-style-type: none"> <li>Add Case Transfer Form in CareFirst</li> <li>Assign to Allocated worker</li> <li>Enter details, complete and save</li> </ul> <p>Complete case transfer checklist on G:Drive, save and forward to Admin for scanning</p>	Allocated Worker	An Activity to authorise the Form is triggered to the Team manager

Step	Process	Action by	CareFirst Fields/Codes
8.	Authorise case transfer: <ul style="list-style-type: none"> <li>• Check and authorise case transfer Form in CareFirst</li> <li>• Complete authorisation Activity</li> <li>• Re-Assign the on-going service provision event to CWD Care Mgt Allocation Team (CFCWDAL)</li> </ul>	Team manager	
9.	Hold Allocation Meeting <ul style="list-style-type: none"> <li>• Determine Worker allocation</li> </ul>	Team Managers	
10.	Update CareFirst: <ul style="list-style-type: none"> <li>• Go to Relationships screen for subject. End Team and Worker Allocations</li> <li>• Add Allocation Relationship with new team</li> <li>• Go to subject's MyClient, Reassign On-going Service Provision Event to new Team</li> <li>• Re-Assign CiN Review Activity</li> </ul>	Admin	

Step	Process	Action by	CareFirst Fields/Codes
11.	Allocate worker and update CareFirst: <ul style="list-style-type: none"> <li>Navigate to subject's MyClient/Network .Add Allocation Relationship with worker</li> <li>Re-Assign On-Going Service Provision Event and CiN Review Activity to Worker</li> </ul>	Receiving Team manager	Worker receives automatic CareFirst message re allocation

13.3.1 **CiN review process**

1.	Prepare for CiN review <ul style="list-style-type: none"> <li>Complete CiN review referral form and pass to reviewing officer</li> <li>Agree people to be invited</li> </ul>		
2.	Arrange review: <ul style="list-style-type: none"> <li>Send My review pack &amp; deal with responses</li> <li>Set review date and book venue</li> <li>Manage consultation process</li> </ul>	CiN Reviewing Officer	
3.	Prepare review report: <ul style="list-style-type: none"> <li>Add and complete CiN Review part 1 Form in CareFirst</li> </ul>	Allocated worker	An Activity to authorise the Review Form is triggered to the Team manager

4.	Check and authorise the Review Report	Team manager	
5.	Print and deliver the report to the CiN review Officer for distribution	Allocated worker	
6.	Hold / attend review meeting	Allocated worker CiN RO	
7.	Complete CiN Review Report part 2 in CareFirst	CiN Reviewing Officer	<b>Note:</b> This includes a CiN Review Activity for the new CiN Review Meeting
8.	Check CiN Review Report	Allocated Worker	Minutes are produced, circulated to parents/prof's etc and then uploaded to CareStore
9.	Approve and distribute minutes of the review meeting	CiN reviewing Officer	
10.	To be authorised by Manager	Allocated worker	

13.4 **CWD Child protection process**

**Note** Child protection processes can be invoked at any point in the case. Whilst the child protection discussions and investigations have to be 'fast tracked' to protect the child, the guidance requires that a referral and initial assessment must be recorded. The latter may be very brief, simply recording the necessary details to show that the strategy discussion was required. In practice these steps may be need to be recorded retrospectively.

Step	Process	Action by	CareFirst Fields/Codes
1.	Child protection concerns are identified: <ul style="list-style-type: none"> <li>Determine if strategy discussion is required</li> <li>If No – revert to standard referral process</li> </ul>	CWD Worker	
2.	In CareFirst <ul style="list-style-type: none"> <li>Assign Strategy Discussion form</li> </ul>		
3.	Update CareFirst: <ul style="list-style-type: none"> <li>Enter Details in Strategy Discussion Form after meeting</li> <li>Complete and Save the Form</li> </ul>	Duty worker	An authorisation Activity is sent to the Manager. Outcome = completed or abandoned Reason codes not used
4.	In CareFirst: <ul style="list-style-type: none"> <li>Authorise Strategy Discussion outcome</li> <li>Complete authorisation Activity</li> </ul>	CWD Manager	Event is ended automatically If S47 enquiries are required the S47 Form (& core assessment Form, if required) will be triggered on authorisation. CareAssess Events are created automatically
5.	If a child protection investigation is not required – continue with assessment process  If a child protection investigation is required go to step 8		

Step	Process	Action by	CareFirst Fields/Codes
6.	Assign S47 Enquiries and core assessment	CWD Manager	
7.	Carry out S47 Enquiries <ul style="list-style-type: none"> <li>Record findings in Core Assessment and outcome in S47 Form</li> <li>Complete &amp; Save Form</li> </ul>	Duty Worker	An Activity to authorise the Form is triggered
8.	Confirm S47 outcome: <ul style="list-style-type: none"> <li>Check and authorise S47 enquiry Form</li> <li>Complete the authorisation Activity</li> </ul>	CWD Manager	
9.	If child protection conference is required alert CPRU If CP concerns are not substantiated – revert to assessment process	CWD Manager	
10.	Arrange Planning meeting <ul style="list-style-type: none"> <li>Record details of meeting in Core Assessment Form</li> </ul>	Duty Worker	
11.	Complete Core Assessment. <ul style="list-style-type: none"> <li>Enter details in Core Assessment Form.</li> <li>Complete and Save the Form</li> </ul>		An Activity to authorise the assessment is triggered to the Manager

Step	Process	Action by	CareFirst Fields/Codes
12.	Check and authorise core assessment <ul style="list-style-type: none"> <li>• Authorise core assessment Form</li> <li>• Complete authorisation Activity</li> </ul>	CWD manager	
13.	<a href="#">See Section 6.2 – arrange initial child protection conference</a>		

14. **Case Recording and Updating Basic Details**

The following section details all information that can be recorded or updated throughout a case outside of the core processes referenced throughout this handbook

Step	Process	Action by	CareFirst Fields/Codes
1.	Case Recording via Observations		<p>The following Observation Subjects may be used as appropriate:</p> <ul style="list-style-type: none"> <li>• Manager Notes</li> <li>• EDS Involvement</li> <li>• Statutory Visit</li> <li>• <a href="#">Record Sheet Entry</a></li> </ul> <p><a href="#">Fields should be completed as follows:</a></p> <ul style="list-style-type: none"> <li>• Date notified – date the information was received, visit made etc</li> <li>• Source – the name of the person/organisation providing the information</li> <li>• Relationship – the relationship between the source of the information and the client</li> <li>• Responsible – Eno of the allocated worker/manager</li> </ul> <p><b>NOTE:</b> all observations should be completed to</p>

Step	Process	Action by	CareFirst Fields/Codes								
			prevent them being amended.								
2.	<p>Life Events – these are significant events in a child's life, a life event when recorded will automatically remind you of the anniversary of this event every year</p> <ul style="list-style-type: none"> <li>• Access Life Events via CareFirst Menu Item</li> </ul>		<p><b>Life Event Types and Categories:</b></p> <table border="0"> <tr> <td><b>Bereavement</b></td> <td>Death of a relative Death of a partner Death of a child Death of a parent Death of a close friend Death of a sibling</td> </tr> <tr> <td><b>Birth</b></td> <td>Birth of a child</td> </tr> <tr> <td><b>Marriage/Marriage breakup</b></td> <td>Marriage  Divorce Separation</td> </tr> <tr> <td><b>Medical</b></td> <td>Hospital admission Hospital discharge Short term illness Long term illness Chronic Illness Terminal Illness</td> </tr> </table>	<b>Bereavement</b>	Death of a relative Death of a partner Death of a child Death of a parent Death of a close friend Death of a sibling	<b>Birth</b>	Birth of a child	<b>Marriage/Marriage breakup</b>	Marriage  Divorce Separation	<b>Medical</b>	Hospital admission Hospital discharge Short term illness Long term illness Chronic Illness Terminal Illness
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Step	Process	Action by	CareFirst Fields/Codes											
3.	<p>Person Basic Details</p> <ul style="list-style-type: none"> <li>Access Person Details by Selecting 'Person Details' from within the 'My Client' screen</li> </ul>		<p>The following Information should always be checked and updated as appropriate:</p> <ul style="list-style-type: none"> <li>Names</li> <li>Addresses</li> <li>Telephone numbers</li> <li>Date of birth</li> <li>Role</li> <li>Ethnicity</li> </ul>											
4.	<p>Classifications</p> <ul style="list-style-type: none"> <li>Access Person Details by Selecting 'Person Details' from within the 'My Client' screen and clicking on the Classifications folder</li> </ul>	<p>The following is a list of all classifications that may be used – those in bold indicate that they are KEY Classifications and will be displayed on the My Client screen whilst open.</p> <table border="1"> <thead> <tr> <th>Category</th> <th>Classification</th> </tr> </thead> <tbody> <tr> <td>Communication Needs</td> <td>Audio</td> </tr> <tr> <td></td> <td>Braille</td> </tr> <tr> <td></td> <td>CD Rom</td> </tr> <tr> <td></td> <td>Intervener</td> </tr> <tr> <td></td> <td>Interpreter</td> </tr> </tbody> </table>	Category	Classification	Communication Needs	Audio		Braille		CD Rom		Intervener		Interpreter
Category	Classification													
Communication Needs	Audio													
	Braille													
	CD Rom													
	Intervener													
	Interpreter													

Step	Process	Action by	CareFirst Fields/Codes
			Large print
			Makaton
			Moon
			PECS
			BSL signer
			Tape
		First Language	Various
		Nationality	Various
		Religion	Various
		Immigration Status	Asylum seeker
			Exceptional leave to remain in the UK
			Persons from abroad
			Refugee status
			<b>Unaccompanied asylum seeker</b>

Step	Process	Action by	CareFirst Fields/Codes
		Legal orders for Children in the Community	<b>Residence order</b>
			<b>Special guardianship order</b>
			<b>Supervision order (interim or full)</b>
5.	<p>Relationships</p> <ul style="list-style-type: none"> <li>Access Relationships by clicking on the 'Network' button within the 'My Client' screen</li> </ul>	<p>The following is a list of some of the Key Relationships to be recorded when appropriate – this list is not exhaustive:</p> <p><b>Allocation:</b></p> <ul style="list-style-type: none"> <li>Allocated team – identifies the team the case is allocated to. A case should always have an allocated team</li> <li>Primary Worker – this is the main worker and can be used for any type of worker e.g. social worker, CCO etc– the person entered against this role will display on the My Client front screen. Primary worker should be recorded for cases at initial assessment stage and beyond</li> <li>Secondary Worker – to be used for co workers</li> </ul> <p><b>Personal:</b></p> <ul style="list-style-type: none"> <li>Mother (or main carer if not mother)</li> <li>Father</li> <li>Siblings</li> </ul>	

Step	Process	Action by	CareFirst Fields/Codes
		<ul style="list-style-type: none"> <li>Anyone else living in the same house as the child</li> </ul> <b>Professional:</b> <ul style="list-style-type: none"> <li>GP</li> <li>Health Visitor</li> <li>Dentist</li> <li>School</li> </ul>	

15. **Service Recording**

The following Table lists all Service Types and Elements to be used when recording Service Provision

Service Type	Element	Notes
Leaving care	LC supported lodgings	
Leaving care	LC foster care	
Children residential	Children residential	