

Children's Centre Management Information System; CCM

Guide to recording Family Support Casework

Document history

Version	Date	Owner	Position	Comments
1.0.	23/12/2013	Lauren Burbidge	Data Quality Officer	Upgrade to CCM Casework

All reasonable effort has been made to ensure this documentation is complete and accurate at the time of distribution. Information in this document is subject to change without notice.

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1.0 Casework

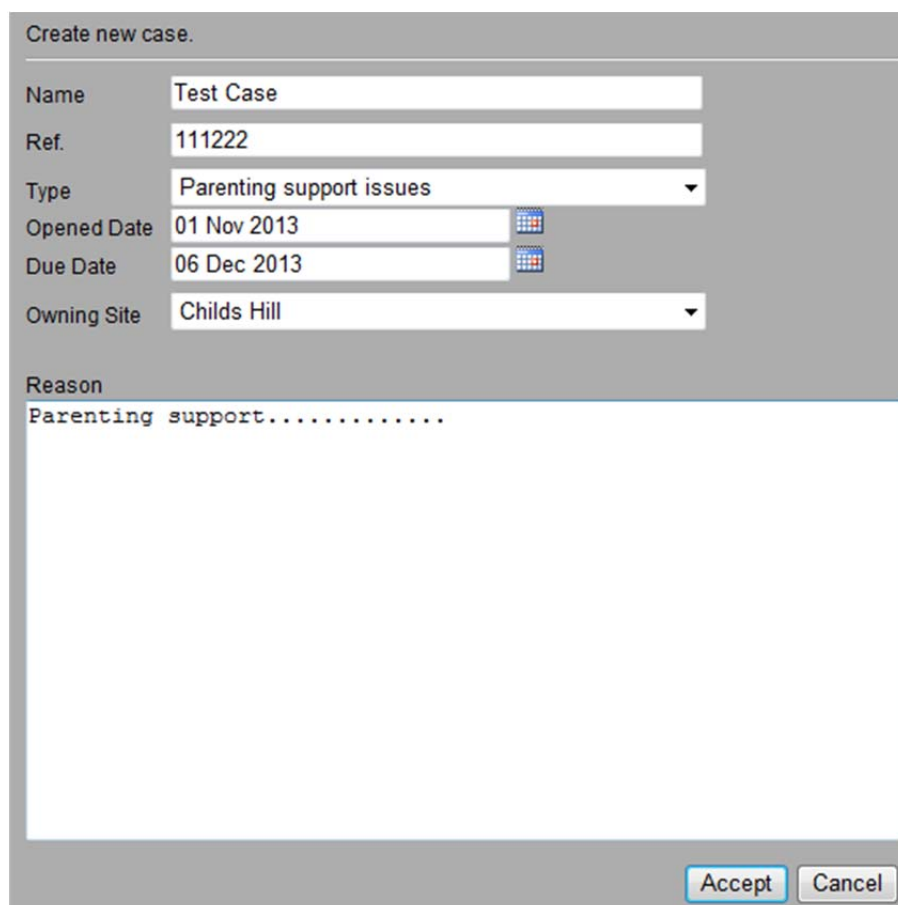
If a family or individual is in receipt of Family Support Work the casework section of CCM can be used to keep a chronological record of details about the aims and support being provided and to keep a record of correspondence, changes and referrals, reviews and progress.

1.1 Adding a case

Select 'Casework' from the menu on the left of the site, then select 'All Cases' from the sub menu beneath.

If there are any cases already listed these will appear to the left of the main screen.

Select 'New Case' which appears beneath the list of cases on the right. A box will appear which will request details about the case.



The screenshot shows a web-based form titled "Create new case." with the following fields and values:

- Name:** Test Case
- Ref.:** 111222
- Type:** Parenting support issues (dropdown menu)
- Opened Date:** 01 Nov 2013 (calendar icon)
- Due Date:** 06 Dec 2013 (calendar icon)
- Owning Site:** Childs Hill (dropdown menu)
- Reason:** Parenting support..... (text area)

At the bottom right of the form are two buttons: "Accept" and "Cancel".

Field name	Comments
Name	This should be the name of the family / individual
Ref.	Case reference number
Type	<p>The case types can be one of the following:</p> <ul style="list-style-type: none"> • Parenting support issues • Practical parenting • Domestic violence • Housing • Speech and language • Special needs – child • Special needs – parent/carer • Mental health • Financial issues • Eating support • Sleep support • Isolated parent
Opened date	Date the referral to family support was received
Due date	The due date should be 6 weeks from the date opened. With each case there should be a review after 6 weeks to review the aims if the family support is to continue or refer onto another service or close the case.
Owning site	Centre providing family support work
Reason	Any further details about the referral reason

When all data is entered select 'Accept', located at right hand corner of the box.

When this has been completed the box will close and the case will appear in the case list on the left of the main screen.

Clicking on one entry in the case list will populate the tabs to the right with the case details. You can then modify the details in the tabs accordingly.

1.2 Overview tab

The overview tab holds the case primary details, which populates from the details entered when the case was created.

In addition to the information that was added when creating the case, the following details can be added:

- Responsible provider
- Referring provider
- Date case closed

The screenshot shows a web application interface for case management. At the top, there are several tabs: 'Overview' (which is highlighted), 'Associated Services', 'Members', 'Actions', 'Notes', and 'Case Attachments'. Below the tabs, the section is titled 'Case Primary Details'. It contains a form with the following fields:

- Name:** A text input field containing 'Test Case'.
- Ref.:** A text input field containing '111222'.
- Type:** A dropdown menu with 'Parenting support issues' selected.
- Responsible Provider:** A dropdown menu.
- Referring Provider:** A dropdown menu.
- Opened:** A date input field showing '01 Nov 2013' with a calendar icon to its right.
- Due Date:** A date input field showing '06 Dec 2013' with a calendar icon to its right.
- Closed:** A date input field with a calendar icon to its right.
- Status:** A dropdown menu with 'Open' selected.
- Reason:** A large text area containing the text 'Parenting support.....'.

At the bottom of the form, there are two buttons: 'Save Primary Details' and 'Undo Primary Details'.

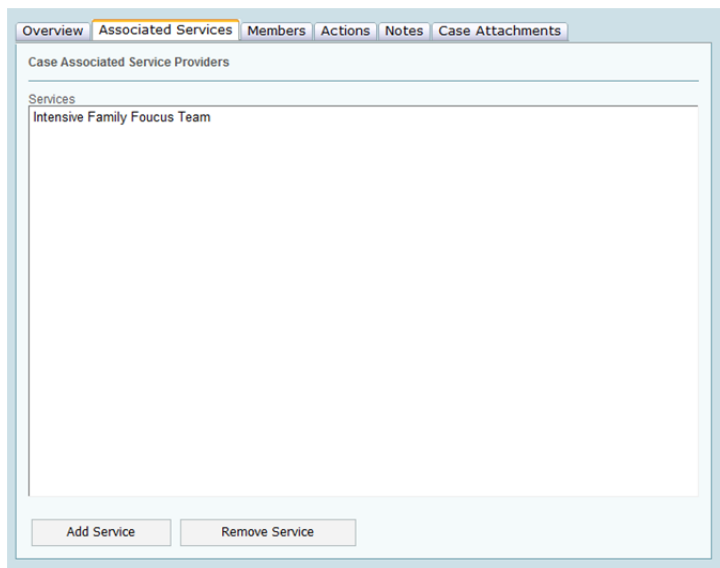
You can modify the Name, Ref. and Reason fields, select new entries from drop down boxes and specify dates by pressing the calendar icons in the screen.

For reference, a case will have a Status of 'Closed' if a closed date has been set. If you wish to reopen a closed case then just delete the closed date.

Once you are happy with any modifications press the 'Save Primary Details' button to commit the changes to the database.

1.3 Adding associated services

Selecting the Services tab will show all those services associated with the case:

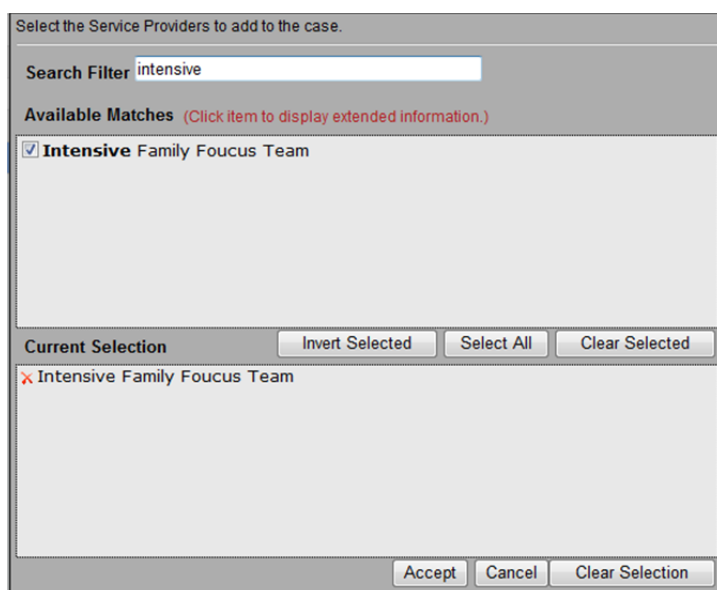


To add a service provider, press the button labelled 'add service' located towards the bottom of the page.

In the pop-up screen enter the required service name into the search filter.

If you are unsure of the names of the service providers configured in the system then you can just enter % - this will return all Service Providers.

Ticking the box next to the name will add the service provider to the Current Selection section at the bottom of the screen.



Pressing the 'Accept' button will add the Service Provider to the casework.

To remove an associated service select the service listed on the main associated services screen and then select 'remove service' located to the bottom of the screen.

1.4 Linking a case to an individual / keyworker

To link a case to an individual in receipt of outreach support select the 'Members' tab at the top of the main screen.

The screenshot shows a web application interface for managing case members. At the top, there are six tabs: 'Overview', 'Associated Services', 'Members' (which is highlighted), 'Actions', 'Notes', and 'Case Attachments'. Below the tabs, the main content area is titled 'Case Associated Members'. It is divided into two vertical panels. The left panel is titled 'Individuals' and contains a list with two entries: 'Mrs Mother Test' and 'Miss Child Test'. Below this list are two buttons: 'Add Individual' and 'Remove Individual'. The right panel is titled 'Keyworkers' and contains a list with one entry: 'Daphne Pratt'. Below this list are two buttons: 'Add Keyworker' and 'Remove Keyworker'.

Select 'Add individual' at the bottom of the box labelled individual.

A box will appear with a search field at the top, enter the name of the individual.

Note: the 'individual' is any family member that is engaged in the family support work.

Select the Individuals to add to the case.

Search Filter Minimum entry 2 characters.

Available Matches (Click item to display extended information.)

☒ Child Test

Current Selection

✗ Mother Test
✗ Child Test

A list of possible matches will be produced.

Note: if you are searching for individuals it is possible to extend the information shown on the screen by clicking on the person's name:

Select the Individuals to add to the case.

Search Filter Minimum entry 2 characters.

Available Matches (Click item to display extended information.)

☒ Child Test
Name: Miss Child Test
Addr: 1 Testing Street, Testing Town, TT1 1TT, (OutSide)
Gender: Female
DOB: 01 May 2013 Age: 0

Current Selection

✗ Mother Test
✗ Child Test

When correct individual is found select the tick box beside their name and then select accept at the bottom of the screen. The individual will now be linked to this case.

The same procedure is followed to add a keyworker to the case, but instead this is done in the 'Keyworker' box.

Note: the key workers are not exclusive to Family Support Workers / Children's Centre, any professional involved can be added.

To remove an individual or key worker, select the applicable person and then press the relevant 'Remove...' button. You will be presented with a confirmation box to confirm that you actually wish to delete the entry.

1.5 Actions

Actions can be created within a case to keep a record of developments and changes.

The left hand side of the screen will list all those actions recorded against the case. Selecting one of the list entries will populate the Overview and Participants tabs with the relevant information.

The screenshot displays a web application interface for managing case actions. At the top, there is a navigation bar with tabs: Overview, Associated Services, Members, Actions (selected), Notes, and Case Attachments. Below this, the main area is titled 'Case Actions'. On the left, there is a list of actions, with 'First Home Visit' selected and highlighted in blue. Below the list is a 'New Action' button. On the right, there is a detailed view of the selected action, with tabs for Overview (selected) and Participants. The Overview tab contains the following fields:

- Name: First Home Visit
- Type: Home visit
- Created: 04 Nov 2013
- Due Date: 04 Nov 2013
- Completed: 04 Nov 2013
- Status: Open
- Reason: Initial visit with family
- Outcome: (empty text area)

At the bottom right of the detailed view is a 'Save Action' button.

Overview tab

Details about why the action is required along with any outcome can be viewed here.

Participants tab

A list of all those people specified in the Services tab will be shown here. Once an action has been created you can specify which of these people the action is related to by ticking the box next to their name(s).

New Action button

Press the 'New Action' button to log a new action against the case:

Enter the necessary details as required and select the applicable 'Type' entry from the drop down box. The due date is when the action needs to be completed by.

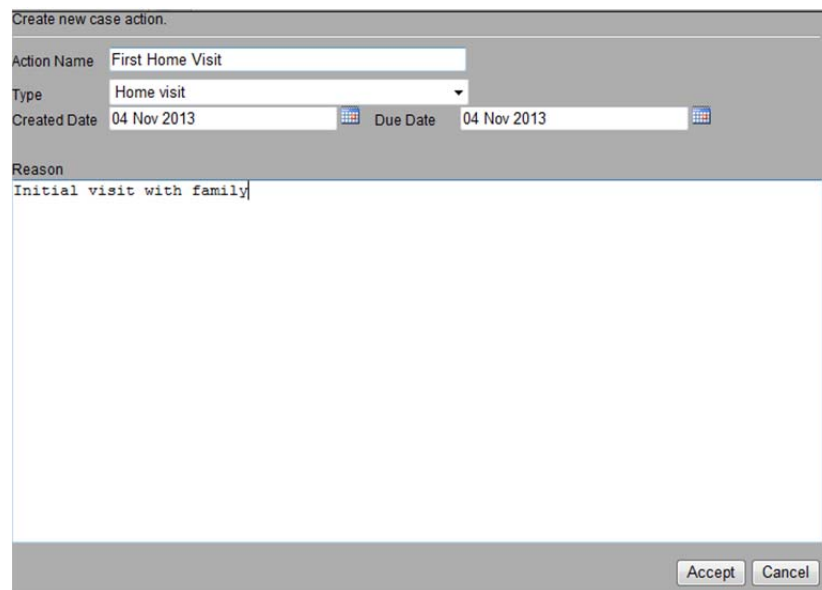
The action types that can be chosen are:

- CAF Closed
- CAF Opened
- CAF Review
- Core Group
- Feedback from parent
- Home visit
- Individual Education Plan (IEP) meeting
- Meeting in centre
- Meeting with Health Visitors
- Meeting with professionals
- Meeting with Safer Families
- Meeting with school / childcare
- Meeting with Social Care
- Meeting with Welfare Rights
- Referred to Social Care

Once an action has been completed select the Completed date using the calendar function and enter an Outcome in the relevant text box. Should you wish to reopen an action just delete the closed date.

Pressing the 'Accept' button will add the action to the case.

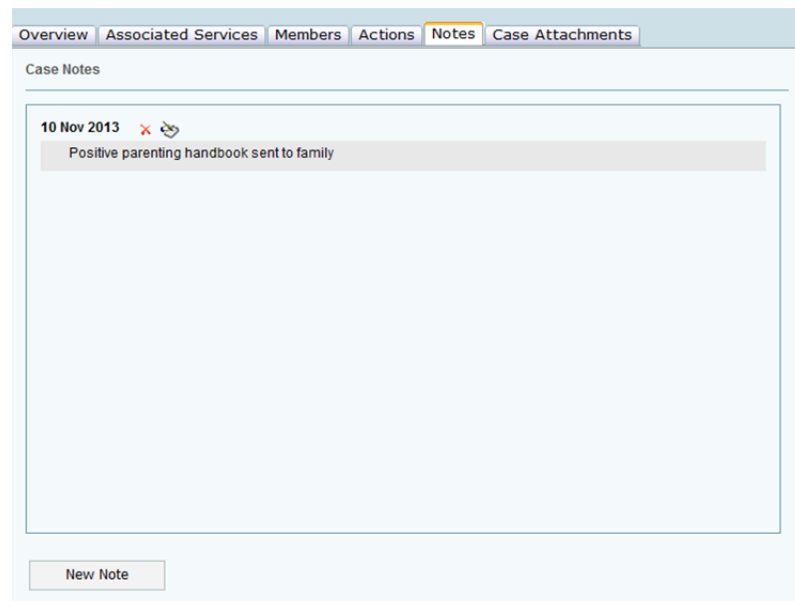
You can now go back in to the action and specify the necessary participants.



The screenshot shows a 'Create new case action' dialog box. It has a title bar 'Create new case action.' and a grey background. The form contains the following fields: 'Action Name' with the text 'First Home Visit'; 'Type' with a dropdown menu showing 'Home visit'; 'Created Date' with a date picker showing '04 Nov 2013'; and 'Due Date' with a date picker showing '04 Nov 2013'. Below these is a 'Reason' section with a text area containing 'Initial visit with family'. At the bottom right are 'Accept' and 'Cancel' buttons.

1.6 Case notes

You can view or attach any relevant notes about the case using this tab.



The screenshot shows the 'Case Notes' tab selected in a tabbed interface. The tabs are 'Overview', 'Associated Services', 'Members', 'Actions', 'Notes', and 'Case Attachments'. The 'Case Notes' section has a title bar 'Case Notes' and a list of notes. The first note is dated '10 Nov 2013' and contains the text 'Positive parenting handbook sent to family'. To the right of the date is a red cross icon and a writing icon. At the bottom of the section is a 'New Note' button.

To attach a new note press the 'New Note' button located at the bottom of the screen.

To view a note in its entirety or edit the note, click the writing icon located to the right hand side of the red cross. Alternatively you can double click the note of interest.

Press the red cross to delete the note.

1.7 Case attachments

This tab will allow you to save, view and delete any files that may be associated with the case.

Overview | Associated Services | Members | Actions | Notes | **Case Attachments**

Attachments

Outcomes Star

Name: Outcomes Star

Type: Outcomes Star

Original Path: Test document.docx

Content Type: application/msword Size: 12345 bytes

Description: Outcomes Star 28/11/2013

Download Save Delete

Attachments for the selected case.

New Attachment

Adding attachments

To add an attachment press the 'New Attachment' button located at the bottom of the screen.

Add the path to the attachment or click browse to locate.

File: C:\Users\lauren.burbidge\Desktop\Test document Browse...

Type: Outcomes Star

Name On Server: Outcomes Star

Description: Outcomes Star 28/11/2013

Upload Cancel

The following document types are available for selection:

- Application forms
- CAF
- CAF Review
- Case documents
- Evidence documents
- Feedback forms
- Letters from Children's Centre
- Letters from professionals
- Medical information
- Outcomes Star
- Receipts
- Referral forms
- Social Care documents

Provide the required information and select the applicable file type from the 'Type' drop down box. Finally press the 'Upload' button to save the file to the database.

Downloading (viewing) an attachment

Select the file of interest from the attachment list in the left hand side of the screen and then press the 'Download' button.

Deleting an attachment

Select the file of interest from the attachment list in the left hand side of the screen and then press the 'Delete' button.

1.8 Case administration

Selecting an entry in the Case List will allow you to specify which additional sites (if any) can view the case.

In addition you can specify if a case should be archived. If this option is selected then the case will no longer show when the Overview, All cases, Open Cases or Closed Cases main menu options are selected.

Once you are happy with your modification(s) press the 'Save Settings' button to update the database.

Should you wish to modify the owning site then you will need to log in to the management console rather than a specific site.

Note: Selecting a main menu option will cancel any changes you made to the case visibility.

The screenshot displays the 'Case Administration' interface. On the left, a sidebar titled 'Case Administration' contains a 'Case List' section with a '[New Case]' button. The main content area is titled 'Case Administration' and includes 'Status Information: Administrative Settings For Case:'. Under 'Case Primary Settings', there is a dropdown menu for 'Owning Site' set to 'Childs Hill', an 'Archived' checkbox, and a 'Save Settings' button. Below this is the 'Case Visibility' section, which states 'Sites currently able to access selected case.' and contains a large empty box for site selection. A red footnote at the bottom reads '* Modifiable by Management Console login only.'