

eCAF Episode

eCAF Episode	
Customer	eCAF Generic Customer Base
Date	November 2010

This document is based on a generic PROtocol eCAF system. Please note that some functionality may differ according to your specific customer configuration.

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Document Distribution

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Document History

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eCAF Episode

This document outlines how to record and manage an **eCAF Episode** for a child/young person in **PROTOCOL eCAF** (version 4.02).

The eCAF Episode consists of the following stages:

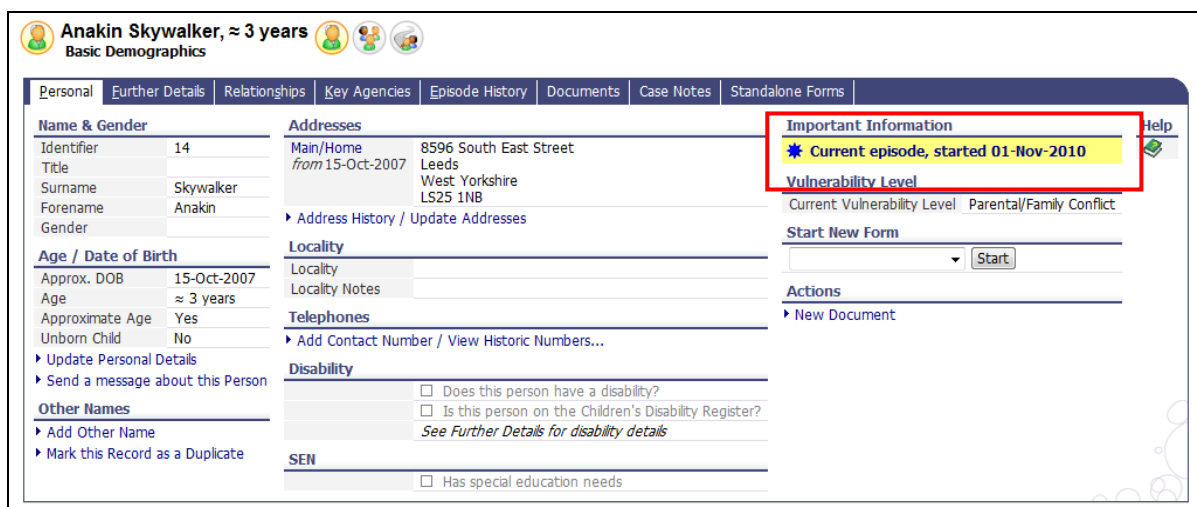
- Starting a New ECAF Episode
- Obtaining Consent
- Conducting CAF Assessments
- Agreeing Contributions
- Recording Meetings
- Re-starting a CAF Assessment
- Transferring a case to ICS (if applicable)
- Completing an eCAF Episode

Accessing Current and Previous eCAF Episodes

All eCAF Episodes can be accessed from the child/young persons **Demographics Record**. The **Important Information** section on the **Personal** tab or the **Episode History** tab will list both previous and current eCAF Episodes recorded on **PROTOCOL eCAF**.

1. Select the **Current Episode** or **Previous Episode** link within the Personal Tab to navigate to the Episode Pathway

TIP: Click  will also display the Episode Pathway



The screenshot shows the eCAF system interface for a child named Anakin Skywalker, approximately 3 years old. The interface is divided into several tabs: Personal, Further Details, Relationships, Key Agencies, Episode History, Documents, Case Notes, and Standalone Forms. The Personal tab is selected, displaying various sections including Name & Gender, Age / Date of Birth, Other Names, Addresses, Localities, Telephones, Disability, and SEN. The Important Information section is highlighted with a red box, showing a current episode started on 01-Nov-2010. The Vulnerability Level is set to Parental/Family Conflict. The Start New Form section has a dropdown menu and a Start button. The Actions section includes a link to New Document.

Anakin Skywalker, ~ 3 years	
Basic Demographics	
Personal	Further Details Relationships Key Agencies Episode History Documents Case Notes Standalone Forms
Name & Gender	
Identifier	14
Title	
Surname	Skywalker
Forename	Anakin
Gender	
Age / Date of Birth	
Approx. DOB	15-Oct-2007
Age	~ 3 years
Approximate Age	Yes
Unborn Child	No
Other Names	
Add Other Name	
Mark this Record as a Duplicate	
Addresses	
Main/Home	8596 South East Street
from 15-Oct-2007	Leeds
	West Yorkshire
	LS25 1NB
Address History / Update Addresses	
Localities	
Locality	
Locality Notes	
Telephones	
Add Contact Number / View Historic Numbers...	
Disability	
☐ Does this person have a disability?	
☐ Is this person on the Children's Disability Register?	
See Further Details for disability details	
SEN	
☐ Has special education needs	
Important Information	
* Current episode, started 01-Nov-2010	
Vulnerability Level	
Current Vulnerability Level	Parental/Family Conflict
Start New Form	
	Start
Actions	
New Document	

The following example shows a child with a previous eCAF episode:

Anne Example, 10 years   

Basic Demographics

Personal Further Details Relationships Key Agencies Episode History Documents Case Notes Standalone Forms Pre-Assessment Forms

Name & Gender
 Identifier 9
 Title
 Surname Example
 Forename Anne
 Gender Female

Age / Date of Birth
 Actual DOB 01-Jan-2000
 Age 10 years
 Unborn Child No

Update Personal Details
 Send a message about this Person

Other Names
 Alias Annabel Example
 Previous Name Ann Example
 Add Other Name
 Mark this Record as a Duplicate

Addresses
 Main/Home from 25-Feb-2000 1 Ley Street Ilford Essex 162 7QX
 Main/Home from 01-Jan-2000 88 North West Street Leeds West Yorkshire LS25 1NB
 Other Contact from 20-Feb-2000 34 Lawns Hall Close Lawnswood Leeds West Yorkshire LS16 8HY

Address History / Update Addresses

Localities
 Locality North
 Locality Notes

E-Mail
 E-Mail Anne.Example@anywhere.co.uk

Important Information
 Previous episode, from 01-Jan-2008 to 14-Oct-2010
 Current episode, started 20-Jan-2000 (Open for more than 1 year !)

Vulnerability Level
 Current Vulnerability Level Emotional Warmth and Stability

Start New Form
 Start

Actions
 New Document

The **Episode History** Tab will display both current and previous eCAF Episodes. This tab will only be displayed once an eCAF Episode has been created

1. Select an **eCAF episode** from the Episode History tab to drill down to the **Episode Details** tabs

Anne Example, 10 years   

Basic Demographics

Personal Further Details Relationships Key Agencies Episode History Documents Case Notes Standalone Forms Pre-Assessment Forms

Episodes

	Episode Date	End Date	Episode Coordinator	Status
1	01-Jan-2008	14-Oct-2010	Social Worker 1 - Liquid Test Team	
2	20-Jan-2000		Social Worker 1 - Liquid Test Team	

TIP: the **Access Requests** tab will only be visible to users with full access to the record.

Hermione Grainger, 4 years    

Episode 12-Oct-2010

Episode Details Personal Details Activities Involvements Case Notes Services Consent Access Requests

Episode Details
 Episode Coordinator Social Worker 1 - Liquid Test Team
 Episode Date 12-Oct-2010 11:10
 End Date
 Status
 Reason Development – Emotional & social development
 Additional Notes 1

Episode Pathway
 Update Episode

Episode Shielding
 Shielded No
 Reason for Shielding

Consent
 Restrictions Consent is ONLY available to:
 Social Worker 1 - Liquid Test Team

Update current Consent Statement
 New Consent Statement

Cancel Episode
 The episode cannot be cancelled from this screen once the consent has been inserted

Starting a New eCAF Episode

A New eCAF Episode can only be started from the child/young person's demographics record.

1. From the Personal tab, click **New eCAF Episode**

Jack Russell, ≈ 11 years
Basic Demographics

Personal Further Details Relationships Key Agencies Documents Case Notes Standalone Forms

Name & Gender
Identifier: 21
Title: Surname: Russell Forename: Jack Gender: [blank]

Age / Date of Birth
Approx. DOB: 15-Oct-1999
Age: ≈ 11 years
Approximate Age: Yes
Unborn Child: No

Addresses
Main/Home from 01-Jan-2002: 1 Test Street, Leeds, LS1 1AA

Important Information
None at this time.

Start New Pre-Assessment Form
[Dropdown] [Start]

Actions
▶ **New eCAF Episode**
▶ New Document

Disability
☐ Does this person have a disability?
☐ Is this person on the Children's Disability Register?
See Further Details for disability details

SEN
☐ Has special education needs

NOTE: If the demographics record does not exist on **PROTOCOL** eCAF then a new person record will need to be created. For further guidance on creating new person records refer to the **eCAF Demographics User Manual**.

If a current ECAF Episode exists the link to create a New ECAF Episode will not be available.

Hermione Grainger, 4 years
Basic Demographics

Personal Further Details Relationships Key Agencies Episode History Documents Case Notes Standalone Forms Pre-Assessment Forms

Name & Gender
Identifier: 5
Title: Surname: Grainger Forename: Hermione Gender: [blank]

Age / Date of Birth
Actual DOB: 01-Jan-2006
Age: 4 years
Unborn Child: No

Addresses
Main/Home from 01-Jan-2006: 34 Lawns Hall Close, Lawnswood, Leeds, West Yorkshire, LS16 8HY

Important Information
Current episode, started 12-Oct-2010

Start New Form
[Dropdown] [Start]

Actions
▶ New Document

Disability
☐ Does this person have a disability?
☐ Is this person on the Children's Disability Register?
See Further Details for disability details

SEN
☐ Has special education needs

The Begin New Episode screen will be displayed.

Jack Russell, ~ 11 years
Episode

Create Cancel - Begin New Episode

New Episode

Start of Episode

Episode Coordinator: Claire Wallace - Liquid Test Team

Episode Date: 01/01/2010 (dd/mm/yyyy)

Reason: Development – Behavioural development

Additional Notes: Additional Information.....

Vulnerability

Given your knowledge of the child, please select from the list of vulnerabilities in the picklist below

Vulnerability Level: Learning Difficulties

1. The **Episode Coordinator** defaults to the user starting the new eCAF Episode
2. The **Episode Date** will default to the current date/time and should be amended if required

NOTE: A future Episode Date/Time can not be entered

3. Select the **Reason** for starting the eCAF Episode from the Reason Picklist
4. Enter any **Additional Notes** as required
5. Select a **Vulnerability Level** from the vulnerability picklist

TIP: the Vulnerability Level can only be created when starting a new episode but once created this can be updated as required from the Further Details tab within the Demographics in order to track the vulnerability level of a child/young person throughout the course of an eCAF episode.

6. Click **Create**

Jack Russell, ~ 11 years
Episode

Create Cancel - Begin New Episode

New Episode

Start of Episode

Episode Coordinator: Claire Wallace - Liquid Test Team

Episode Date: 01/01/2010 (dd/mm/yyyy)

Reason: Development – Behavioural development

Additional Notes: Additional Information.....

Vulnerability

Given your knowledge of the child, please select from the list of vulnerabilities in the picklist below

Vulnerability Level: Learning Difficulties

Fields in Red are **Mandatory** which must be populated in order to create the Episode

TIP: If the New eCAF Episode is not required click the **Cancel** button.

If any mandatory fields such as **Episode Date**, **Reason** or **Additional Notes** are not populated a validation message will appear

Jack Russell, ≈ 11 years Episode

Create Cancel - Begin New Episode

Unable to create record.
The following fields are mandatory/invalid:
Reason is mandatory

New Episode

Start of Episode

Episode Coordinator: Claire Wallace - Liquid Test Team

Episode Date: 01/01/2010 (dd/mm/yyyy)

Reason: [Dropdown menu]

Additional Notes: Additional Information.....

Vulnerability

Given your knowledge of the child, please select from the list of vulnerabilities in the picklist below

Vulnerability Level: Learning Difficulties

If all mandatory fields have been populated the new eCAF Episode will be created, and the Obtain Consent stage displayed. Please refer to the following **Obtain Consent** section for further details.

Jack Russell, ≈ 11 years Case Pathway

Obtain Consent Task Details

Create Record Reset Cancel

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? Yes No

If the above answer is yes, has the child agreed to the CAF? Yes No

Does the person with parental responsibility agree to CAF? Yes No

Date of Consent

Consent Date (dd/mm/yyyy)

Expiration Date (dd/mm/yyyy)

Fair Process Notice issued?

Method of Consent

Person giving consent (if not the Child)

Relationship to the child

Click here to show the list of related people and select a person from that list

Further Details

Click here for guidance on the Consent process

Consent Restrictions

Restrictions: Consent is ONLY available to:

Claire Wallace - Liquid Test Team

Specify Consent Restrictions

Other Details

Comments

Document Reference

Obtain Consent

Consent must be granted in order to give users the ability to start a new eCAF Episode and record a contribution to an eCAF assessment on **PROTOCOL** eCAF.

New Consent Statement

Once a new eCAF episode is created the Episode Co-ordinator will automatically be prompted to obtain consent and the following screen will be displayed:

Jack Russell, ≈ 11 years
Case Pathway

Obtain Consent Task Details

Create Record Reset Cancel

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☐ No

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☐ Yes ☐ No

Date of Consent

Consent Date (dd/mm/yyyy)

Expiration Date (dd/mm/yyyy)

☐ Fair Process Notice issued?

Method of Consent

Person giving consent (if not the Child)

Relationship to the child

[Click here to show the list of related people and select a person from that list](#)

Further Details

[Click here for guidance on the Consent process](#)

Consent Restrictions

Restrictions Consent is ONLY available to:

☐ Claire Wallace - Liquid Test Team

[Specify Consent Restrictions](#)

Other Details

Comments

Document Reference

TIP: Select the **Obtain Consent** task from the work tray to record the new consent details.

No Due Date (1)		
No Due Date	Jack Russell, ≈ 11 years	CAF Episode - Obtain Consent

1. Answer the questions under the **Persons Giving Consent** area

For example the following responses to the three questions posed will allow the user to continue to the CAF assessment stage:

Person Giving Consent	
Is the child of the age & understanding to make his/her own decisions?	☒ Yes ☐ No
If the above answer is yes, has the child agreed to the CAF?	☒ Yes ☐ No
Does the person with parental responsibility agree to CAF?	☐ Yes ☐ No

Person Giving Consent	
Is the child of the age & understanding to make his/her own decisions?	☐ Yes ☒ No
If the above answer is yes, has the child agreed to the CAF?	☐ Yes ☐ No
Does the person with parental responsibility agree to CAF?	☒ Yes ☐ No

Person Giving Consent	
Is the child of the age & understanding to make his/her own decisions?	☒ Yes ☐ No
If the above answer is yes, has the child agreed to the CAF?	☒ Yes ☐ No
Does the person with parental responsibility agree to CAF?	☐ Yes ☒ No

Person Giving Consent	
Is the child of the age & understanding to make his/her own decisions?	☒ Yes ☐ No
If the above answer is yes, has the child agreed to the CAF?	☒ Yes ☐ No
Does the person with parental responsibility agree to CAF?	☒ Yes ☐ No

- Specify the **Method of Consent** as Verbal or Written from the picklist

Method of Consent	Verbal v
-------------------	---

NOTE: If 'Verbal' is selected the 'must obtain written consent' alert can be generated, and a task will be displayed in the worktray, see example below:

26-Jul-2009 12:18	CLM Rosie Davis, ≈ 3 years	Written Consent - You have entered details of Verbal Consent to the current episode. Please make...
-------------------	-----------------------------------	--

The 'Written Consent' alert is dependent on your Local Authority bespoke customer eCAF configuration. Please consult your Liquidlogic project manager for details.

- Record the **Person giving consent (if not the child)** within the appropriate text field

OR

Select the **Click here to show the list of related people...** link to specify a relation recorded within **PROTOCOL** eCAF as the person granting consent

Person giving consent (if not the Child)	
Click here to show the list of related people and select a person from that list	

A list of recorded relationships for the child/young person will be displayed. Select the radio button for the relation granting consent, if preferred:

Person giving consent (if not the Child)	Davinia Davis
Click here to hide the list of related people	
☒ Mother	Davinia Davis, ≈ 20 years

- Enter any **Further Details** which are significant to the consent being given

Further Details	Further Details should go here...
-----------------	-----------------------------------

TIP: Select the  [Click here for guidance on the Consent process](#) link for help regarding the consent process. Click the **Back** button on the Internet Explorer toolbar to return from the Consent Guidance to the Obtain Consent screen.

Guidance on Consent

Every CAF Episode requires consent by the child or the parent / carer. Therefore, before you can proceed to the CAF Assessment you must provide information regarding this consent. This document describes the various parts of the consent and the subsequent access control from the episode coordinator.

Basic Consent Information

- The first information you must input is whether it is the child or the parent giving consent. The combination of answers is validated, for instance if you select that the child cannot make his/her own decisions then the second option should be left blank and the consent decision belongs to the person with parental responsibility. The information on who is giving consent is mandatory. The two examples below are the options that lead to 'Consent Given' status and allow you to proceed to the CAF Assessment.

Option 1:

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☒ Yes ☐ No

Option 2:

Is the child of the age & understanding to make his/her own decisions? ☒ Yes ☐ No

If the above answer is yes, has the child agreed to the CAF? ☒ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☐ Yes ☐ No

- You must select the Method of Consent, i.e. if it is written or verbal. This question is mandatory.

Method of Consent:

If the consent is verbal, a task will be generated in your worktray to remind you to request written consent. For legal reasons it is necessary that all consent statements are provided in writing, although you are allowed to proceed to the CAF Assessment with only verbal consent, if the child's needs require quick action.

- If the consent is given by the person with parental responsibility, then it is mandatory that you provide the name of the person giving consent. This field is not marked in red, as it is not always mandatory, but the validation will prevent you from creating the record unless the name is provided:

Unable to create record.
If the decision does not belong to the Child you must provide the name of the person giving consent

You can also add Further Details on the person giving consent, although this is not mandatory.

- You are also required to input the date of the consent, which has to be on or after the start date of the episode. Since there can be many consent statements for the same episode, if you input historical consents you must make sure that you are recording them in chronological order, as there is validation so that a consent event cannot precede a previously recorded consent event.

Enter **Date** Consent was given, should an expiration date be known this can also be entered and tick box if Fair Process Notice had been issued.

Date of Consent

Consent Date (dd/mm/yyyy)

Expiration Date (dd/mm/yyyy)

☒ Fair Process Notice issued?

The **Consent Restrictions** section allows a user to specify who can and cannot access the child/young person's eCAF Episode on **PROTOCOL** eCAF. By default, access to the episode is only available to the episode coordinator but can be updated, as required.

Consent Restrictions

Restrictions Consent is ONLY available to:

 Claire Wallace - Liquid Test Team

Specify Consent Restrictions

Specifying Access and Restrictions

1. Click **Specify Consent Restrictions**

Consent Restrictions

Restrictions Consent is ONLY available to:

 Claire Wallace - Liquid Test Team

Specify Consent Restrictions

The following screen enables access to be specifically granted or denied to a user, department or group. By default, access is only granted to the Episode Co-ordinator and denied to everyone else, except those specifically granted access.

- To allow or deny access to an individual user, group or users or department click on **Click here to add a user or department** next to the **Access will be granted to:** or **Access will be denied to:** question, as required

Liqüidlogic Home Menu Profile Help Logout

OK - Restrict Access Cancel **Select Consent Access Restrictions**

Configure Security Restrictions

✓ Access will be granted to: Social Worker 1 - Liquid Test Team ✗
[Click here to add a user, department or group...](#)

✗ Access will be denied to: Everyone, except those specifically granted access in the section above.
[Click here to add a user, department or group...](#)

Verify security restrictions:
 User to verify: [Click here to select a user...](#)

The Address Book will be displayed, enabling the user to browse and select the required user/department/group that should be granted/denied access. For further guidance on using the Address Book, please refer to the **eCAF General User Manual**.

Liqüidlogic Home Menu Profile Help Logout

Cancel Allow access to User or Department

My Contacts
My Contacts

Professionals
All Professionals

Departments
All Departments

Groups
All Groups

Manager Contacts

Ecaf User 1	(Your Manager)	ECAF Team
Social Worker 1	(Yourself)	Liquid Test Team
Team Manager 1	(Your Supervisor)	Liquid Test Team

Recent Contacts

Social Worker 1		Liquid Test Team
Duty Team	Social Services	
Ecaf User 1		ECAF Team
Admin Person		Liquid Test Team
Team Manager 1		Liquid Test Team
Panos Worker		Liquid Test Team

- Once the required user/group/department has been selected, click **OK – Restrict Access**

OK - Restrict Access Cancel **Select Consent Access Restrictions**

Configure Security Restrictions

✓ Access will be granted to: Claire Wallace - Liquid Test Team ✗
Social Worker 1 - Liquid Test Team ✗
[Click here to add a user, department or group...](#)

✗ Access will be denied to: Everyone, except those specifically granted access in the section above.
[Click here to add a user or department...](#)

Verify security restrictions:
User to verify: [Click here to select a user...](#)

The Obtain Consent screen will be updated to illustrate the new security restrictions:

Consent Restrictions

Restrictions **Consent is ONLY available to:**

Claire Wallace - Liquid Test Team
Social Worker 1 - Liquid Test Team

Specify Consent Restrictions

- Enter **Comments** (if required)
- Enter **Document Reference** (if required)
- Click **Create Record**

Create Record Reset Cancel

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No **Date of Consent**

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☒ No **Consent Date** 01/01/2010 (dd/mm/yyyy)

Does the person with parental responsibility agree to CAF? ☒ Yes ☐ No **Expiration Date** (dd/mm/yyyy)

☒ **Fair Process Notice issued?**

Method of Consent Written
Person giving consent (if not the Child)
Relationship to the child Mother

Click here to show the list of related people and select a person from that list

Further Details

Click here for guidance on the Consent process

Consent Restrictions

Restrictions **Consent is ONLY available to:**

Claire Wallace - Liquid Test Team
Social Worker 1 - Liquid Test Team

Specify Consent Restrictions

Other Details

Comments Additional information or comments here..... **Document Reference**

The consent statement will be saved and displayed as the **Current Consent Statement** for the current episode:

Obtain Consent  

Obtain Consent **Restart** **History**

Current Consent Statement, 01-Jan-2010

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? **Date of Consent**

If the above answer is yes, has the child agreed to the CAF? Consent Date

Does the person with parental responsibility agree to CAF? Expiration Date

Method of Consent Fair Process Notice issued?

Person giving consent (if not the Child)

Relationship to the child

Further Details

 [Click here for guidance on the Consent process](#)

Consent Restrictions

Restrictions

 Claire Wallace - Liquid Test Team

 Social Worker 1 - Liquid Test Team

Other Details

Comments Document Reference

[View Episode Details](#)

Restart Obtaining Consent

The current consent statement can be restarted, a new consent statement obtained, if required.

1. From the **Obtain Consent** stage, select the **Restart** tab
2. Enter an **initiation date** and **reason** and then click **Start this Step**

Obtain Consent  

Obtain Consent **Restart** **History**

Please provide date of initiation:

Please provide reason for starting manually:

OR

1. From the **Episode History** tab within Demographics, select the current episode:

 **Jack Russell, ≈ 11 years**
Basic Demographics

Personal Further Details Relationships Key Agencies Episode History Documents Case Notes Standalone Forms

Episodes

Episode Date	End Date	Episode Coordinator	Status
1	01-Jan-2010	Claire Wallace - Liquid Test Team	

- From the **Episode Details** tab, click **New Consent Statement**

 **Jack Russell, ≈ 11 years**
Episode 01-Jan-2010

Episode Details Personal Details Activities Involvements Case Notes Services Consent Access Requests

Episode Details

Episode Coordinator	Claire Wallace - Liquid Test Team
Episode Date	01-Jan-2010
End Date	
Status	
Reason	Development – Behavioural development
Additional Notes	Additional Information.....

▶ Episode Pathway
▶ Update Episode

Episode Shielding

Shielded	No
Reason for Shielding	

Consent

Restrictions	Consent is ONLY available to:
	 Claire Wallace - Liquid Test Team  Social Worker 1 - Liquid Test Team

▶ Update current Consent Statement
▶ **New Consent Statement**

Cancel Episode

The episode cannot be cancelled from this screen once the consent has been inserted

A new 'Obtain Consent' screen will be displayed, facilitating the user to record new details including updating access and restrictions as required. Please refer to the earlier **New Consent Statement** section in this document for details.

Obtain Consent

Create Record Reset Cancel

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☒ Yes ☐ No

Date of Consent

Consent Date: 01/01/2010 (dd/mm/yyyy)

Expiration Date: (dd/mm/yyyy)

☐ Fair Process Notice issued?

Method of Consent Written

Person giving consent (if not the Child): Mrs Mary Russell

Relationship to the child: Mother

[Click here to show the list of related people and select a person from that list](#)

Further Details:

[Click here for guidance on the Consent process](#)

Consent Restrictions

Restrictions: Consent is ONLY available to:

- Claire Wallace - Liquid Test Team
- Social Worker 1 - Liquid Test Team

[Specify Consent Restrictions](#)

Other Details

Comments:

Document Reference:

Previous Records

Status	Description
1 Active	CAF Episode - Obtain Consent
2 Completed 12-Nov-2010 14:54	Current Consent Statement, 01-Jan-2010

TIP: Previous and Active Consent Statements can be accessed from the list of Previous Records.

- Once all details are entered click **Create Record**
- The **PROTOCOL** eCAF system will prompt the user to select the **Confirm** Checkbox to confirm whether security restrictions have been modified and then click **Create Record**

Obtain Consent Task Details

Unable to create record.

Please confirm that the information is correct by checking the Confirm option below

Create Record Reset Cancel

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☒ Yes ☐ No

Date of Consent

Consent Date: 01/01/2010 (dd/mm/yyyy)

Expiration Date: (dd/mm/yyyy)

☐ Fair Process Notice issued?

Method of Consent Written

Person giving consent (if not the Child): Mrs Mary Russell

Relationship to the child: Mother

[Click here to show the list of related people and select a person from that list](#)

Further Details:

[Click here for guidance on the Consent process](#)

Consent Restrictions

Restrictions: Consent is ONLY available to:

- Claire Wallace - Liquid Test Team
- Social Worker 1 - Liquid Test Team
- Social Test Manager - Liquid Test Team

[Specify Consent Restrictions](#)

Other Details

Comments:

Document Reference:

Please Confirm

☐ Confirm

Security Restrictions have been modified

Updating the Consent Statement

A consent statement may need to be updated over time to reflect new consent comments expressed by the child/young person, parents and eCAF professionals. The 'update' facility allows the method of consent, further details and comments to be updated but not the consent date and to whom access is granted or denied. If for example, Access Control Restrictions need to be changed then a 'New Consent Statement' must be recorded instead.

1. Access the **eCAF Episode Details** tab within the current eCAF episode

TIP: Select the **View Episode Details** link from the Current Consent Statement screen:

The screenshot displays the 'Obtain Consent' interface. On the left, a flowchart outlines the process: 'Episode Started' leads to 'Obtain Consent' (highlighted with a dashed yellow box), which can lead to 'Consent Denied' or 'CAF Assessment'. 'CAF Assessment' leads to 'CAF Assessment Agreeing Contributions', then to 'Meeting', 'Transfer to ICS', and finally 'Episode Completed'. An 'Active Episode' box is also shown. On the right, the 'Obtain Consent' form is visible, showing the 'Current Consent Statement, 26-Jul-2009'. The form includes sections for 'Person Giving Consent' (with questions about the child's age and understanding, and the person's agreement), 'Access Control' (with restrictions and a list of users: 'Social Worker 1 - Liquid Test Team' and 'Ecaf User 1 - ECAF Team'), and 'Date of Consent' (with the date '26-Jul-2009' and a 'View Episode Details' link highlighted with a red box). Below the form, a 'Previous Records' table lists two records: 'Completed 26-Jul-2009 12:56' for 'Current Consent Statement, 26-Jul-2009' and 'Completed 26-Jul-2009 12:56' for 'Previous Consent Statement, 20-Jul-2009 to 26-Jul-2009'.

Status	Description
1 Completed 26-Jul-2009 12:56	Current Consent Statement, 26-Jul-2009
2 Completed 26-Jul-2009 12:56	Previous Consent Statement, 20-Jul-2009 to 26-Jul-2009

OR

From the **Episode History** tab within Demographics, select the current episode:

The screenshot shows the 'Liqidlogic' interface. At the top, there's a navigation bar with 'Home', 'Menu', 'Profile', 'Help', and 'Logout'. Below this, the user profile for 'Rosie Davis, ≈ 3 years' is shown, with a 'CWD' status. The 'Basic Demographics' section is active, and the 'Episode History' tab is selected. The 'Episodes' table lists one episode: '1' with 'Episode Date' '26-Jul-2009 11:14', 'End Date' (empty), 'Episode Coordinator' 'Social Worker 1 - Liquid Test Team', and 'Status' (empty). A hand cursor is pointing at the 'End Date' column. Below the table, the 'Documents' section states 'There are no documents.'

- Click **Update Current Consent Statement**

The screenshot shows the Liquidlogic web application interface. At the top, there is a navigation bar with 'Home', 'Menu', 'Profile', 'Help', and 'Logout'. Below this, a user profile for 'Rosie Davis, ~ 3 years' is displayed, along with the episode date '26-Jul-2009'. A series of tabs are visible: 'Episode Details', 'Activities', 'Involvements', 'Case Notes', 'Services', 'Consent', and 'Access Requests'. The 'Episode Details' tab is active, showing fields for 'Episode Coordinator' (Social Worker 1 - Liquid Test Team), 'Episode Date' (26-Jul-2009 11:14), 'End Date', 'Status', 'Reason' (Development of Baby, Child or Young Person - Health), and 'Additional Notes' (Additional Notes should go here...). Below these are links for 'Episode Pathway' and 'Update Episode'. The 'Episode Shielding' section shows 'Shielded' as 'No' and a field for 'Reason for Shielding'. The 'Consent' section shows 'Restrictions' and 'Access is ONLY available to:' with a list of users: 'Social Worker 1 - Liquid Test Team' and 'Ecaf User 1 - ECAF Team'. A red box highlights the link 'Update current Consent Statement' under the 'Consent' section. Below this is a link for 'New Consent Statement' and a 'Cancel Episode' section with a message: 'The episode cannot be cancelled from this screen once the consent has been inserted'.

The current consent statement opens in an editable view to allow the user to add further details or comments in relation to the current consent:

- Update the **Method of Consent**, **Further Details** and **Comments**, as required and click **Update**

The screenshot shows the 'Update Current Consent Statement' form. At the top, there are 'Update' and 'Cancel' buttons, followed by the title '- Update Consent Statement'. Below this is a sub-header 'Update Current Consent Statement, 26-Jul-2009'. The form is divided into several sections: 'Person Giving Consent' with questions 'Is the child of the age & understanding to make his/her own decisions?' (No) and 'If the above answer is yes, has the child agreed to the CAF?' (Yes), and 'Does the person with parental responsibility agree to CAF?' (Yes). The 'Method of Consent' is set to 'Written'. The 'Person giving consent (if not the Child)' is 'Davina Davis'. The 'Further Details' section has a text area with 'Further Details go here...'. The 'Access Control' section shows 'Restrictions' and 'Access is ONLY available to:' with a list of users: 'Social Worker 1 - Liquid Test Team' and 'Ecaf User 1 - ECAF Team'. The 'Date of Consent' section shows 'Consent Date' as '26-Jul-2009' and a 'Comments' text area with 'Comments can go here...'. The form has a blue header bar and a footer bar with 'Liquidlogic' and 'Commercially Confidential'.

The updated consent statement will be displayed on the **Episode Details** tab:


Rosie Davis, ≈ 3 years CWD





Episode 26-Jul-2009

Episode Details | Activities | Involvements | Case Notes | Services | Consent | Access Requests

Episode Details

Episode Coordinator	Social Worker 1 - Liquid Test Team
Episode Date	26-Jul-2009 11:14
End Date	
Status	
Reason	Development of Baby, Child or Young Person - Health
Additional Notes	Additional Notes should go here...

[▶ Episode Pathway](#)
[▶ Update Episode](#)

Episode Shielding

Shielded	No
Reason for Shielding	

Consent

Restrictions	Access is ONLY available to:  Social Worker 1 - Liquid Test Team  Ecaf User 1 - ECAF Team
--------------	--

[▶ Update current Consent Statement](#)
[▶ New Consent Statement](#)

Cancel Episode

The episode cannot be cancelled from this screen once the consent has been inserted

The **Consent** tab (within the eCAF Episode Details) will also display a history of Consent Statements:


Home Menu Profile Help Logout


Rosie Davis, ≈ 3 years CWD





Episode 26-Jul-2009

Episode Details | Activities | Involvements | Case Notes | Services | Consent | Access Requests

	Consent Date	Ended At	Entered By	Comments
1	26-Jul-2009			Comments can go here...
2	20-Jul-2009	26-Jul-2009		Comments can go here...

Consent Denied

If consent is not given within the New Consent Statement then the eCAF episode co-ordinator cannot continue with the episode or complete a CAF assessment for this child/young person. The consent denied stage would be activated.

For example, the following responses to the three questions posed will lead to the consent denied stage:

Person Giving Consent	
Is the child of the age & understanding to make his/her own decisions?	☒ Yes ☐ No
If the above answer is yes, has the child agreed to the CAF?	☐ Yes ☒ No
Does the person with parental responsibility agree to CAF?	☐ Yes ☐ No

Person Giving Consent	
Is the child of the age & understanding to make his/her own decisions?	☐ Yes ☒ No
If the above answer is yes, has the child agreed to the CAF?	☐ Yes ☐ No
Does the person with parental responsibility agree to CAF?	☐ Yes ☒ No

1. Complete the new consent statement and then click **Create Record**

NOTE: Please refer to the earlier section on **New Consent Statement** for details on how to record this.

Obtain Consent

Obtain Consent **Task Details**

Create Record **Reset** **Cancel**

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☐ Yes ☒ No

Date of Consent

Consent Date 01/01/2010

Expiration Date

☐ Fair Process Notice issued?

Method of Consent Verbal

Person giving consent (if not the child) Mary Russell

Relationship to the child Mother

[Click here to show the list of related people and select a person from that list](#)

☐ Can this episode be opened without consent? (emergency only)

Further Details

[Click here for guidance on the Consent process](#)

Consent Restrictions

Restrictions **Consent is ONLY available to:**

- Claire Wallace - Liquid Test Team
- Ecaf User 1 - ECAF Team

[Specify Consent Restrictions](#)

Other Details

Comments

Document Reference

Schedule 2 Justification Code

Schedule 3 Justification Code

The **Consent Denied** stage is activated on the episode pathway:

A Consent Denied task will also be created within the user's worktray:

No Due Date	Jack Russell, ≈ 6 years	Consent Denied
-------------	-------------------------	----------------

2. Enter the **End Date**
3. Select the **Withdrawal Reason** from the picklist
4. Select the **End Reason** from the picklist
5. Record any **details of work carried out**, if applicable
6. Select a **Success Rating** from the picklist, if applicable
7. Record **Parental withdrawal comments**, if applicable.
8. Record **Child withdrawal comments**, if applicable.
9. Select a **Final Vulnerability Level** from the picklist, if applicable
10. Click **Complete Episode**

Consent Denied  

Consent, Denied **Task Details**

Update Episode 01-Jan-2010

Start and End Date

Episode Date 01-Jan-2010
Reason Development of Baby, Child or Young Person - Family & social relationships
Original Reason details here.....
End Date 01/01/2010 

End Reason

Withdrawal Reason Code Privacy Reasons
End Reason Consent Denied
Details of Work Carried Out add details here.....

Success Rating 5: Least Successful
Parent withdrawal comments Details here.....
Child withdrawal comments

Vulnerability

Given your knowledge of the child please rate the child's vulnerability on a scale of 1-4 using the Threshold Criteria
Final Vulnerability Level 1 - Universal

The Retention Record screen will be displayed:

11. Select a **Retention Code** from the picklist
12. Update the **Retention date**, if appropriate
13. Specify the **Action on Expiration** from the picklist
14. Record **Retention Notes** and the **Paper File Location** and then click **Finalise**

- Create new Retention Record

Information: The retention calculation has resulted in a **retention record being generated**.
Please make any amendments to the record below and either click Save or Finalise to confirm your changes.

Retention Record

Retention Details

Retention Status Draft

Calculated Retention Details

Calculated Code Child becomes 18
Calculation Retention Date is calculated to be this person's date of birth (15-Nov-2004) offset by 18 years
Calculated Date 15-Nov-2022

Actual Retention Details

Retention Code Child becomes 18
Retention Date 15-Nov-2022 
Action on Expiration Begin Purge Process

Notes

Retention Notes

Paper Files

Paper File Location

Audit

Requested By
Date Requested 

The eCAF episode will be displayed as completed, ending at the Consent Denied stage.

Starting CAF Assessments

Once a Current CAF episode has been created and consent obtained and record, the Episode Coordinator will receive a task in their work tray to **Complete a CAF Assessment for the child**.

No Due Date	Jack Russell, ≈ 6 years	CAF Assessment - Please complete CAF Assessment for Child
-------------	-------------------------	---

NOTE: The episode coordinator is the only person that can start the CAF assessment within **PROTOCOL** eCAF; however other professionals can contribute to the assessment once it has been started by the Episode Coordinator.

1. Click on the task **CAF Assessment – Please Complete CAF Assessment for Child**
2. Click **Start Assessment**

A CAF assessment can also be allocated to other **PROTOCOL** eCAF users to allow them to contribute to the assessment.

CAF Assessment  

CAF Assessment **Task Details**

Now that a CAF Assessment has begun, you must **select a user, department or group** who will contribute to the Assessment.
If selecting a user or department you must allocate to them the right to access this task, and then create the assessment for them.
If selecting a group, the task will be shown to all members of the group, but only members with appropriate access level will be able to contribute.
You can repeat this for any number of users, departments or groups.

[Create a new CAF Assessment Contribution](#)

 [Click here to select a user, department or group...](#)

[Draft CAF Assessment Contributions](#)

No assessment contributions have been started.

TIP: To progress through a stage in the system refer to the helpful hints/tips displayed in the green box. For example:

Now that a CAF Assessment has begun, you must **select a user, department or group** who will contribute to the Assessment.
If selecting a user or department you must allocate to them the right to access this task, and then create the assessment for them.
If selecting a group, the task will be shown to all members of the group, but only members with appropriate access level will be able to contribute.
You can repeat this for any number of users, departments or groups.

CAF Assessment Contributions

Both the episode coordinator and other active **PROTOCOL** eCAF users can contribute to a child/young person's eCAF assessment providing that they have consent.

1. Navigate to the **CAF Assessment** stage within the Episode Case Pathway

TIP: Click on the task **CAF Assessment – Please Complete CAF Assessment for Child** from the work tray:

No Due Date	Jack Russell, ≈ 6 years	CAF Assessment - Please complete CAF Assessment for Child
-------------	-------------------------	---

The CAF assessment contribution screen is displayed:

1. Select **Click here to select a user, department or group**

CAF Assessment  

CAF Assessment **Task Details**

Now that a CAF Assessment has begun, you must **select a user, department or group** who will contribute to the Assessment.
If selecting a user or department you must allocate to them the right to access this task, and then create the assessment for them.
If selecting a group, the task will be shown to all members of the group, but only members with appropriate access level will be able to contribute.
You can repeat this for any number of users, departments or groups.

[Create a new CAF Assessment Contribution](#)

 [Click here to select a user, department or group...](#)

[Draft CAF Assessment Contributions](#)

No assessment contributions have been started.

- From the Address Book, browse for and select a contributor to the CAF Assessment and confirm this selection

The screenshot shows a web interface with a sidebar on the left containing 'My Contacts', 'Professionals', 'Departments', and 'Groups'. The main area displays 'Manager Contacts' with a list of contacts: 'Claire Wallace (Yourself)' and 'Liquid Test Team'. A red circle highlights the 'Claire Wallace (Yourself)' entry.

- Click **Start** to activate this Contribution to the CAF Assessment

The screenshot shows the 'CAF Assessment' window with the 'Task Details' tab selected. It contains instructions for selecting a user, department, or group. Below the instructions, there is a section for 'Create a new CAF Assessment Contribution' with a list of users. The 'Start' button next to 'Claire Wallace' is circled in red.

TIP: If starting a CAF Assessment Contribution which is assigned to yourself then the CAF Form tab will be displayed, prompting the user to either start a new blank form (or if available, to copy forward answers from previously completed CAF Assessments for this child/young person.):

The screenshot shows the 'CAF Form' tab in the 'CAF Assessment' window. It has a 'Copy Forward' section with the text: 'There are no previous Assessments for Jack Russell, ≈ 6 years, so you do not have the option to copy answers forward at this time. Click 'Start Blank' to start the new Assessment.' A 'Start Blank' button is visible below the text.

NOTE: Please refer to the **CAF form tab** section in this document for further details.

Assigning Assessment Contributions

1. Click on the task **CAF Assessment – Please Complete CAF Assessment for Child** from the work tray

No Due Date	Jack Russell, ≈ 6 years	CAF Assessment - Please complete CAF Assessment for Child
-------------	-------------------------	---

2. Select **Click here to select a user, department or group** to add further **PROTOCOL** eCAF users to contribute to the CAF Assessment

CAF Assessment  

CAF Assessment Task Details

All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.

Create a new CAF Assessment Contribution

 Click here to select a user, department or group...

Draft CAF Assessment Contributions

▶ 24-Nov-2010 13:10, CAF Assessment by pmorgan - Liquid Test Team (Copy Forward) [Print] Cancel

3. From the Address Book, browse for and select a contributor to the CAF Assessment and confirm this selection
4. Click **Start**

The following example shows the user called 'Ecaf User 1' has been assigned a new CAF assessment contribution:

CAF Assessment  

CAF Assessment Task Details

All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.

Create a new CAF Assessment Contribution

 Ecaf User 1 ✗

Start new CAF Assessment Contribution for Ecaf User 1 - Start

Optionally, you can send information or instructions to this contributor here:

Draft CAF Assessment Contributions

▶ 26-Jul-2009 13:56, CAF Assessment by Social Worker 1 - Liquid Test Team (Assigned to You) [Print] *In progress - unable to cancel*

03-Aug-2009 10:49, CAF Assessment by Admin Person - Liquid Test Team (Assigned to Admin Person) [Print] *In progress - unable to cancel*

03-Aug-2009 11:37, CAF Assessment by Panos Worker - Liquid Test Team (Copy Forward) [Print] Cancel

NOTE: Please refer to the following section on **Granting Access to CAF Assessment Contributors** if an assessment contributor does not have access to the episode and is not listed within the current consent statement

Granting Access to CAF Assessment Contributors

The eCAF Co-ordinator will not be able to start the new CAF Assessment Contribution for this person if they do not have access to the episode, therefore access must be granted. The **Grant Access** button will be displayed instead of the **Start** button for contributors who do not have access. In the example below, the user 'Admin Person' does not have access to the CAF episode, see below:

The screenshot shows the 'CAF Assessment' interface. At the top, there are tabs for 'CAF Assessment' and 'Task Details'. Below the tabs, a green box contains the message: 'All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.' Underneath, there is a section titled 'Create a new CAF Assessment Contribution'. It shows a user icon and the name 'Admin Person' with a red 'X' next to it. Below this, it says 'User: Admin Person does not have access to this process' followed by a 'Grant access' button. Further down, there is a section titled 'Draft CAF Assessment Contributions' which shows a list of contributions, including one from '26-Jul-2009 13:56, CAF Assessment by Social Worker 1 - Liquid Test Team (Copy Forward) [Print]' with a 'Cancel' button next to it.

1. Click the **Grant Access** button

This is a close-up of the 'Grant access' button from the previous screenshot. It is located next to the text 'User: Admin Person does not have access to this process -'. The button is labeled 'Grant access'.

2. Select the **Role** and **Access level** for the contributor from the picklists
3. Ensure the **Start** date is correct and enter any further information, as required

TIP: Full, Update and Read Only access levels exist. The eCAF Coordinator will automatically be assigned full access level.

In the example below, the current consent statement does not allow the user: 'Admin Person' to access the episode therefore a new consent statement needs to be created. If the user has already been included in the consent statement then only the role and level of access need to be specified.

4. If the contributor does not have consent, click **New Consent Statement** to update the consent details and include this worker, (otherwise click **Create**)

Create Cancel - Add Access (make sure consent statement includes worker)

New Access to Episode

Role and Effective Dates	
Role	
Access Level	
Start Date	
End Date	
	☐ SensitiveService
National Service Category	
Comments	

Additional Access Decision

☐ Additional Access Decision (access outside consent)?

Reason for Additional Access

Reason Type

Schedule 2 Justification Code

Schedule 3 Justification Code

Expiration Date

Worker Details

Worker Admin Person X

Current Consent Statement

Restrictions

Consent is **ONLY** available to:

- Claire Wallace - Liquid Test Team
- Ecaf User 1 - ECAF Team
- Team Manager 1 - Liquid Test Team
- Social Worker 1 - Liquid Test Team
- Super User - ECAF Team
- school one - School
- Nick Tester - Test Department
- paul linsdell - ECAF Team
- eCAF Admin - All Departments
- Joanna Edwards - ECAF Team
- Social Worker2 - Liquid Test Team
- Ecaf User 2 - ECAF Team

▶ New Consent Statement

- Enter the details for the new consent statement, including consent **method** and **date** as required

NOTE: Please refer to the earlier **Obtain Consent** section in this document.

Obtain Consent

Create Record Reset Cancel

New Consent Statement

Person Giving Consent	Date of Consent
Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No	Consent Date 01/02/2010
If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No	Expiration Date
Does the person with parental responsibility agree to CAF? ☒ Yes ☐ No	☐ Fair Process Notice issued?

Method of Consent

Person giving consent (if not the Child)

Relationship to the child

▶ Click here to show the list of related people and select a person from that list

☐ Can this episode be opened without consent? (emergency only)

Further Details

Click here for guidance on the Consent process

Consent Restrictions

Restrictions

Consent is **ONLY** available to:

- Claire Wallace - Liquid Test Team
- Ecaf User 1 - ECAF Team

▶ Specify Consent Restrictions

Other Details

Comments

Document Reference

Schedule 2 Justification Code

Schedule 3 Justification Code

- Click **Specify Access and Restrictions**

Obtain Consent  

Obtain Consent **Task Details**

[Create Record](#) [Reset](#) [Cancel](#)

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ **No**

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☒ **Yes** ☐ No

Method of Consent

Person giving consent (if not the Child)

Relationship to the child

[Click here to show the list of related people and select a person from that list](#)

☐ Can this episode be opened without consent? (emergency only)

Further Details

[Click here for guidance on the Consent process](#)

Date of Consent

Consent Date 

Expiration Date 

☐ Fair Process Notice issued?

Consent Restrictions

Restrictions **Consent is ONLY available to:**

-  Claire Wallace - Liquid Test Team
-  Ecaf User 1 - ECAF Team

[Specify Consent Restrictions](#)

Other Details

Comments

Document Reference

Schedule 2 Justification Code

Schedule 3 Justification Code

- Use the **Click here to add a user, department or group...** to grant access to additional user(s) and then click **OK – Restrict Access**

NOTE: Please refer to the **Specifying Access and Restrictions** section in this document for details.

[OK - Restrict Access](#) [Cancel](#) **Select Consent Access Restrictions**

Configure Security Restrictions

 Access will be granted to:

-  Claire Wallace - Liquid Test Team 
-  Ecaf User 1 - ECAF Team 

[Click here to add a user, department or group...](#)

 Access will be denied to:

-  Everyone, except those specifically granted access in the section above.

[Click here to add a user or department...](#)

Verify security restrictions:

User to verify:  [Click here to select a user...](#)

- Once the New Consent Statement has been updated click **Create Record**

Obtain Consent  

Obtain Consent **Task Details**

Create Record Reset Cancel

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☒ Yes ☐ No

Method of Consent Written

Person giving consent (if not the Child) Mary Russell

Relationship to the child mother

Click here to show the list of related people and select a person from that list

Can this episode be opened without consent? (emergency only) ☐

Further Details

Click here for guidance on the Consent process

Consent Restrictions

Restrictions **Consent is ONLY available to:**

- Claire Wallace - Liquid Test Team
- Ecaf User 1 - ECAF Team
- Admin Person - Liquid Test Team

Specify Consent Restrictions

Other Details

Comments

Document Reference

Schedule 2 Justification Code

Schedule 3 Justification Code

TIP: Ensure that the **Confirm** checkbox is selected before clicking **Create Record**

Obtain Consent **Task Details**

Unable to create record.

Please confirm that the information is correct by checking the Confirm option below

Create Record Reset Cancel

New Consent Statement

Person Giving Consent

Is the child of the age & understanding to make his/her own decisions? ☐ Yes ☒ No

If the above answer is yes, has the child agreed to the CAF? ☐ Yes ☐ No

Does the person with parental responsibility agree to CAF? ☒ Yes ☐ No

Method of Consent Written

Person giving consent (if not the Child) Mary Russell

Relationship to the child mother

Click here to show the list of related people and select a person from that list

Can this episode be opened without consent? (emergency only) ☐

Further Details

Click here for guidance on the Consent process

Consent Restrictions

Restrictions **Consent is ONLY available to:**

- Claire Wallace - Liquid Test Team
- Ecaf User 1 - ECAF Team
- Admin Person - Liquid Test Team

Specify Consent Restrictions

Other Details

Comments

Document Reference

Schedule 2 Justification Code

Schedule 3 Justification Code

Please Confirm

☒ **Confirm**

Security Restrictions have been modified

9. Click **Start** once the new Assessment Contributor has been granted access to the episode

CAF Assessment  

CAF Assessment **Task Details**

All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.

Create a new CAF Assessment Contribution

 Admin Person ✗

Start new CAF Assessment Contribution for Admin Person - Start

Optionally, you can send additional information or instructions to this contributor here:

Draft CAF Assessment Contributions

▶ 24-Nov-2010 13:10, CAF Assessment by pmorgan - Liquid Test Team (Copy Forward) [Print] Cancel

24-Nov-2010 13:16, CAF Assessment by ecaf1 - ECAF Team (Copy Forward) [Print] Cancel

NOTE: The assessment contributor can only begin to contribute to the assessment once the episode co-ordinator clicks the **Start** button as this will generate the task in the contributor's worktray. Each CAF Assessment contributor will receive the following task in their worktray:

Jack Russell, ≈ 6 years **CAF Assessment - Please complete your contribution to the CAF Assessment**

The list of CAF Assessment contributions will be updated indicating the status and to whom they are assigned to, see example below:

CAF Assessment  

CAF Assessment **Task Details**

Assessment Contribution Successfully Created for Panos Worker

Create a new CAF Assessment Contribution

 Click here to select a user...

Draft CAF Assessment Contributions

▶ 26-Jul-2009 13:56, CAF Assessment by Social Worker 1 - Liquid Test Team (Assigned to You) [Print] In progress - unable to cancel

03-Aug-2009 10:49, CAF Assessment by Admin Person - Liquid Test Team (Assigned to Admin Person) [Print] In progress - unable to cancel

03-Aug-2009 11:37, CAF Assessment by Panos Worker - Liquid Test Team (Copy Forward) [Print] Cancel

Completing a CAF Assessment

1. The Episode Coordinator will need to click on the **CAF Assessment – Please Complete CAF Assessment for child** task from their worktray, however a person recording a contribution to a CAF Assessment will need to click on the **CAF Assessment – Please Complete your contribution to the CAF Assessment** task from their worktray

Task for Episode Co-ordinator		
⊖ No Due Date (2)		
No Due Date	Jack Russell, ≈ 6 years	CAF Assessment - Please complete CAF Assessment for Child
No Due Date	Jack Russell, ≈ 6 years	CAF Assessment - Please complete your contribution to the CAF Assessment
Task for Contributor		

The CAF assessment form consists of two tabs; **Information** and **CAF Form**.

Information Tab

The Information tab appears on all assessment forms and provides summary information specific to the stage in the in the child's case. For example; role of user carrying out assessment, name of user carrying out assessment, child's name, assessment type, assessment date and the assessment progression audit.

Save Changes Copy to other people Finalise Assessment Cancel Assessment Close

Information CAF Form

Your Role in this Assessment

Your Role	Lead Operator
-----------	---------------

Assessment Details

Assessment Type	CAF Assessment
Current Status	Draft
Service User	Jack Russell, ≈ 6 years
Lead Operator	Claire Wallace - Liquid Test Team

Assessment Dates

Date Started	01-Feb-2010
Date Completed	24-Nov-2010 13:10

System Audit Times

Time Started	24-Nov-2010 13:10
--------------	-------------------

Assessment Progression Audit

Role	Start Date	End Date	User
	24-Nov-2010 13:10		Claire Wallace

Security Restrictions

Restrictions	Set Restrictions
--------------	------------------

Actions

- Copy Assessment to Briefcase

Parent Assessment

Assessment 24-Nov-2010 13:04, CAF Assessment by Claire Wallace - Liquid Test Team

All text in a **Blue** font which turns **Red** when highlighted will take you to further information relevant to the text

Copying a CAF Assessment to Briefcase

This is only applicable to customers using the **PROTOCOL** Briefcase functionality

1. From the Information tab click **Copy Assessment to Briefcase** and then click **OK**

Save Changes Copy to other people Finalise Assessment Cancel Assessment Close

Information CAF Form

Your Role in this Assessment

Your Role	Lead Operator
-----------	---------------

Assessment Details

Assessment Type	CAF Assessment
Current Status	Draft
Service User	Jack Russell, ≈ 6 years
Lead Operator	Claire Wallace - Liquid Test Team

Assessment Dates

Date Started	01-Feb-2010
Date Completed	24-Nov-2010 13:10

System Audit Times

Time Started	24-Nov-2010 13:10
--------------	-------------------

Assessment Progression Audit

Role	Start Date	End Date	User
	24-Nov-2010 13:10		Claire Wallace

Security Restrictions

Restrictions	Set Restrictions
--------------	------------------

Actions

- Copy Assessment to Briefcase

Parent Assessment

Assessment 24-Nov-2010 13:04, CAF Assessment by Claire Wallace - Liquid Test Team

This allows the assessment to be updated remotely via the Briefcase and then uploaded to the server once completed. Please refer to the **ICS Briefcase** manual for further details.

Locking an Entire Assessment

The Information tab facilitates security restrictions to be placed on the assessment, for example, an entire assessment can be locked from user(s) to prevent them from accessing and viewing it. The open padlock indicates no specific security restriction is applied.

1. Click **Set Restrictions** on the Information tab



Save Changes Copy to other people Finalise Assessment Cancel Assessment Close

Information CAF Form

Your Role in this Assessment
Your Role Lead Operator

Assessment Details
Assessment Type CAF Assessment
Current Status Draft
Service User Jack Russell, ≈ 6 years
Lead Operator Claire Wallace - Liquid Test Team

Assessment Dates
Date Started 01-Feb-2010
Date Completed 24-Nov-2010 13:10

System Audit Times
Time Started 24-Nov-2010 13:10

Assessment Progression Audit

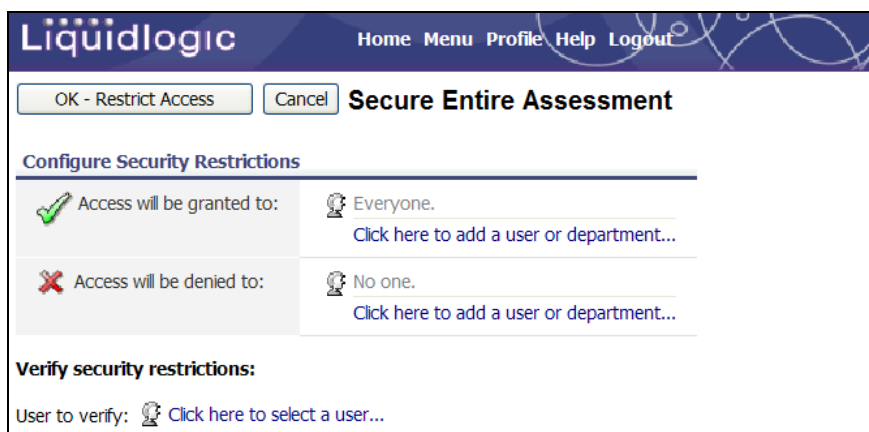
Role	Start Date	End Date	User
	24-Nov-2010 13:10		Claire Wallace

Security Restrictions
Restrictions **Set Restrictions** 

Actions
▶ Copy Assessment to Briefcase

Parent Assessment
Assessment 24-Nov-2010 13:04, CAF Assessment by Claire Wallace - Liquid Test Team

2. To allow or deny access to an individual user, group or users or department click on **Click here to add a user or department** to the right of **Access will be granted to** or **Access will be denied to**, as required



Liqidlogic Home Menu Profile Help Logout

OK - Restrict Access Cancel **Secure Entire Assessment**

Configure Security Restrictions

✓ Access will be granted to:  Everyone.
[Click here to add a user or department...](#)

✗ Access will be denied to:  No one.
[Click here to add a user or department...](#)

Verify security restrictions:
User to verify:  [Click here to select a user...](#)

3. Browse for and select the user or department that should be specifically granted or denied access from the **Address Book**

NOTE: For further information on using the Address Book please refer to the **eCAF General Manual**.

4. Once the user(s) or department have been selected click **OK – Restrict Access**

Unlocking an Entire Assessment

If you are the Lead Operator (specified on the Information Tab) of the assessment you can update the security restrictions in place prior to finalising the assessment.

1. Click **Update Restrictions** on the Information tab

The screenshot shows the 'Information' tab of the CAF Form. At the top, there are buttons: 'Save Changes', 'Copy to other people', 'Finalise Assessment', 'Cancel Assessment', and 'Close'. The 'Information' tab is selected, and the 'CAF Form' sub-tab is active. The page is divided into two main sections: 'Your Role in this Assessment' and 'Security Restrictions'. The 'Your Role in this Assessment' section includes fields for 'Your Role' (Lead Operator), 'Assessment Details' (Assessment Type: CAF Assessment, Current Status: Draft, Service User: Jack Russell, ≈ 6 years, Lead Operator: Claire Wallace - Liquid Test Team), 'Assessment Dates' (Date Started: 01-Feb-2010, Date Completed: 24-Nov-2010 13:10), 'System Audit Times' (Time Started: 24-Nov-2010 13:10), 'Assessment Progression Audit' (a table with columns: Role, Start Date, End Date, User; one row: 24-Nov-2010 13:10, Claire Wallace), 'Actions' (a link: Copy Assessment to Briefcase), and 'Parent Assessment' (Assessment: 24-Nov-2010 13:04, CAF Assessment by Claire Wallace - Liquid Test Team). The 'Security Restrictions' section has a 'Restrictions' field with a red box around the 'Update Restrictions' link and a padlock icon. Below this, it states: 'Access is allowed to all, but will be denied to: Ecaf User 1 - ECAF Team'.

2. Click the **✗** against the user/team from whom you wish to remove the security restriction from and then click **OK – Restrict Access**

The screenshot shows the 'Secure Entire Assessment' dialog box. It has buttons for 'OK - Restrict Access' and 'Cancel'. The title is 'Secure Entire Assessment'. Below the title is the section 'Configure Security Restrictions'. It has two rows: 'Access will be granted to:' with a green checkmark icon and the text 'Everyone, except those specifically denied access in the section below. Click here to add a user, department or group...'; and 'Access will be denied to:' with a red X icon and the text 'Ecaf User 1 - ECAF Team ✗. Click here to add a user or department...'. Below this is the section 'Verify security restrictions:' with the text 'User to verify: Click here to select a user...'.

The information tab of the assessment form will now illustrate that the form contains no security restrictions by showing the open padlock:

The screenshot shows the 'Information' tab of the CAF Form, similar to the first screenshot. The 'Security Restrictions' section now has a 'Restrictions' field with a red box around the 'Set Restrictions' link and an open padlock icon. The rest of the form is identical to the first screenshot.

CAF Form Tab

The CAF Form tab will display two options when starting a CAF assessment which is assigned to you: **Copy Forward Selected** and **Start Blank**

Copy Forward Selected enables the user to copy previous assessment(s) answers into the current assessment. Any information that is copied forward can then be amended accordingly. If a **Blank Assessment** is started no previous answers are carried forward.

1. Click **Start Blank**

OR

Select the relevant checkboxes to specify which previous assessments to copy forward from and then click the **Copy Forward Selected** button

The screenshot shows the Liqidlogic interface for a CAF assessment for Rosie Davis, Age 3 years. The 'Copy Forward' section is active, displaying a list of previous assessments to copy forward from. The 'Copy Forward Selected' button is highlighted.

Created	Assessment	Started By
☐ 5 days ago	Young Persons Service Referral Form (Monday, 11 February 2008, 21:13)	Claire Wallace
☐ 5 days ago	CAF Assessment (Monday, 11 February 2008, 21:13)	Claire Wallace

NOTE: Any sections/answers that have been copied forward from other assessments are highlighted with a **C**, signifying that data has been brought in by copy forward.

The screenshot shows the Liqidlogic interface for a CAF assessment for Rosie Davis, Age 3 years. The 'CAF Form' tab is active, displaying a list of sections to be completed. The 'Assessment Information' section is highlighted with a red box, and the 'Conclusions, Solutions and Act...' section is also highlighted with a red box. The 'Copy Forward' section is visible in the background.

Section	Status
Demographics	Completed
Information Sharing	Completed
Assessment Information	Completed
Services	Completed
CAF Assessment Summary: Needs...	Completed
Conclusions, Solutions and Act...	Completed
Signatures	Completed

2. Use the sections (or headings) on the left hand side to navigate to different parts of the assessment form
3. Click **Save Changes** to save the assessment

Liqùidlogic Home Menu Profile Help Logout

Rosie Davis, ~ 3 years **CMD**
CAF Assessment, 26-Jul-2009 13:56

Save Changes Copy to other people Finalise Assessment Cancel Assessment Close

Information CAF Form

CAF Form

- Information Sharing
- Assessment Information ^M
- Services
- CAF Assessment Summary: Needs ...
- Conclusions, Solutions and Act...
- Signatures

Printable View

CAF Form

Exceptional circumstances: Significant harm to infant, child or young person

If at any time during the course of this assessment you feel that an infant, child or young person has been harmed or abused or is at risk of harm or abuse, you must follow your local safeguarding children's board (LSCB) procedures as set out in the booklet *What to do if you are Worried a Child is Being Abused* (Department of Health 2003).

Click on the link below to open the Every Child Matters Web Site

[Every Child Matters](#)

Other Useful Links

Clicking on the link below will open the YOUR ORGANISATION website in a new window.

[My Web Site](#)

TIP: The assessment will remain as an open task on the home page until it is finalised.

4. Click on the **CAF Assessment – Please complete your contribution to the CAF Assessment** task description from the worktray to return to a CAF Assessment in progress

26-Jul-2009 13:56	CMD Rosie Davis, ~ 3 years	CAF Assessment - Please complete your contribution to the CAF Assessment
-------------------	-----------------------------------	--

The assessment will be displayed on screen will all information previous saved:

Liqùidlogic Home Menu Profile Help Logout

Rosie Davis, ~ 3 years **CMD**
CAF Assessment, 26-Jul-2009 13:56

Save Changes Copy to other people Finalise Assessment Cancel Assessment Close

Information CAF Form

CAF Form

- Information Sharing
- Assessment Information ^M
- Services
- CAF Assessment Summary: Needs ...
- Conclusions, Solutions and Act...
- Signatures

Printable View

CAF Form

Exceptional circumstances: Significant harm to infant, child or young person

If at any time during the course of this assessment you feel that an infant, child or young person has been harmed or abused or is at risk of harm or abuse, you must follow your local safeguarding children's board (LSCB) procedures as set out in the booklet *What to do if you are Worried a Child is Being Abused* (Department of Health 2003).

Click on the link below to open the Every Child Matters Web Site

[Every Child Matters](#)

Other Useful Links

Clicking on the link below will open the YOUR ORGANISATION website in a new window.

[My Web Site](#)

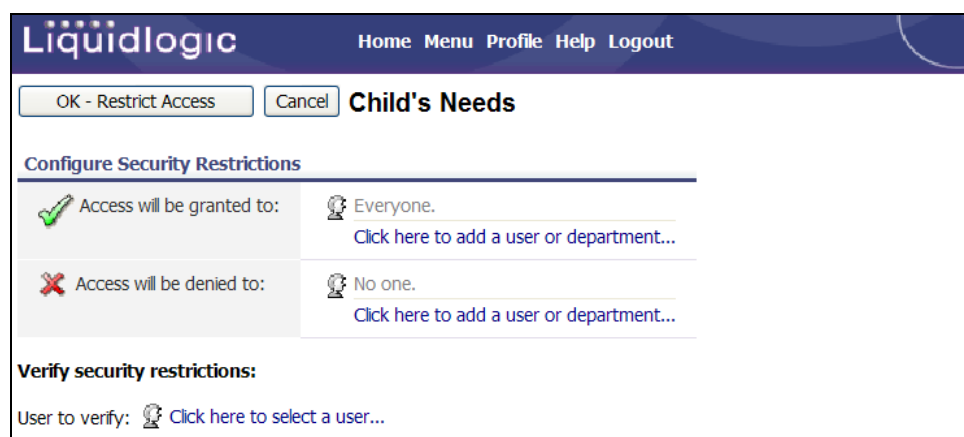
Locking Assessment Questions

In addition to securing an entire assessment the user also has the ability to secure individual answers within the assessment form. This will hide the answers to the selected questions from the specified individuals, teams, groups or departments who have been denied access

1. Click the **Padlock** Icon, found on the right-hand side of the question you wish to restrict access to



2. To allow or deny access to an individual user, group or users or department click on **Click here to add a user or department** to the right of **Access will be granted to** or **Access will be denied to**, as required



3. Browse for and select the user or department that should be specifically granted or denied access from the **Address Book**

NOTE: For further information on using the Address Book please refer to the **eCAF General Manual**.

4. Once the user(s) or department have been selected click **OK – Restrict Access**

The question on the assessment form will now have a closed padlock indicating that security restrictions have been applied:



In this example, if the user (eCAF User 2) with a security restriction against them needs to view the answer to the restricted question they will be unable to do so as it will appear blank:

The screenshot shows the 'Information' tab of the 'CAF Form'. The left sidebar lists sections: Demographics, Information Sharing, Assessment Information, Services, CAF Assessment Summary: Needs..., 1. Development of the unborn baby, infant, child or young person (selected), 2. Parents and Carers, 3. Family and Environmental, Conclusions, Solutions and Act..., and Signatures. The main content area displays a warning: 'Warning: This Assessment is not finalised and is therefore subject to changes.' Below this is section '1. Development of the unborn baby, infant, child or young person' with subsection '1a. Health'. It contains three input fields: 'General Health' (with a blue asterisk icon), 'Physical development', and 'Speech, language and communication'. Each field has a small icon to its right. Below these is subsection '1b. Emotional and Social Development'.

NOTE: The * (blue asterix) will indicate to the restricted user that the actual question has been answered by a professional, simply hover over the * to identify the user whom answered the question. Only the Lead Operator of the assessment can update/remove the security restrictions placed on questions.

Unlocking Assessment Questions

If you are the Lead Operator of the assessment you can update/remove the security restrictions in place prior to finalising the assessment.

1. Click the **Closed Padlock** Icon against the question you want to unlock

This screenshot is similar to the previous one but shows the 'General Health' field with a red circle highlighting a closed padlock icon and a user icon. The text in the field is 'information regarding James's health would go here.....'. The left sidebar is the same as in the previous screenshot.

2. Click the ✖ against the user, group or department the restriction will be removed from and then click **OK – Restrict Access**

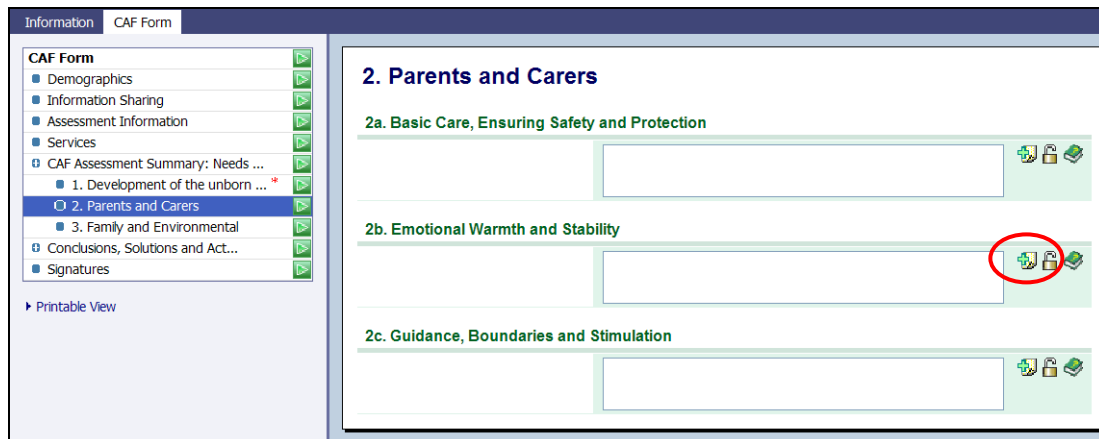
The question on the assessment form will now illustrate that the question contains no security restrictions by showing the open padlock.

This screenshot is identical to the previous one, but the padlock icon in the 'General Health' field is now open (unlocked). The rest of the interface remains the same.

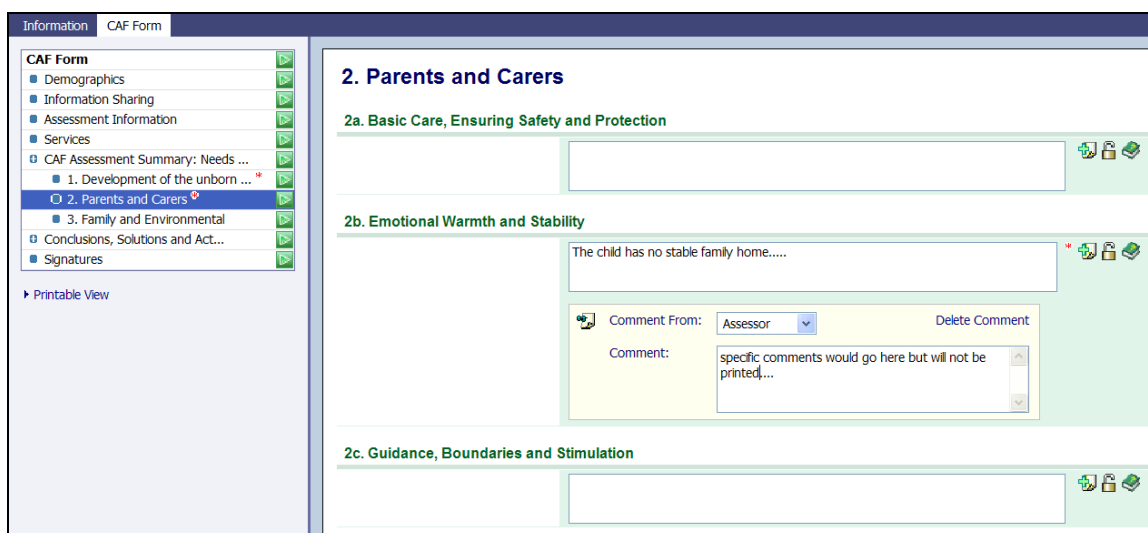
Comments

Most of the fields within the assessment forms allow additional comments to be added. More than one comment can be added to any one question.

1. Click on the  icon to the right of the question that you want to add the comment to

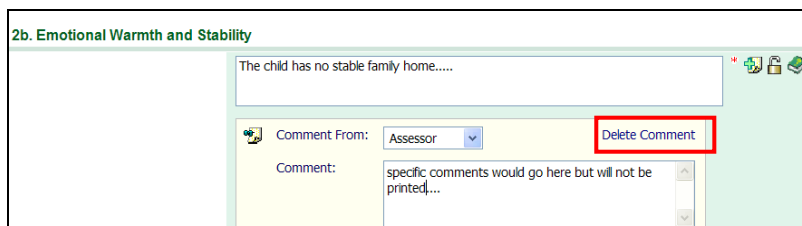


2. Enter **comment** details in the comments box displayed under the selected question



Deleting Comments from an Assessment

1. Select **Delete Comment** from within the comment box



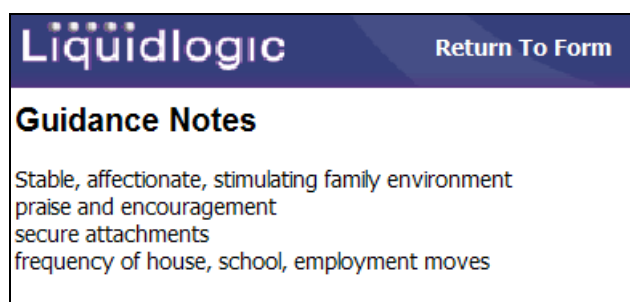
Viewing Help Text

Most of the questions/fields within the CAF assessment form have help text available to view

1. Hover the mouse over the  icon to display the guidance on screen for a few seconds



- TIP:** Alternatively click the  icon to view the help text on a full screen

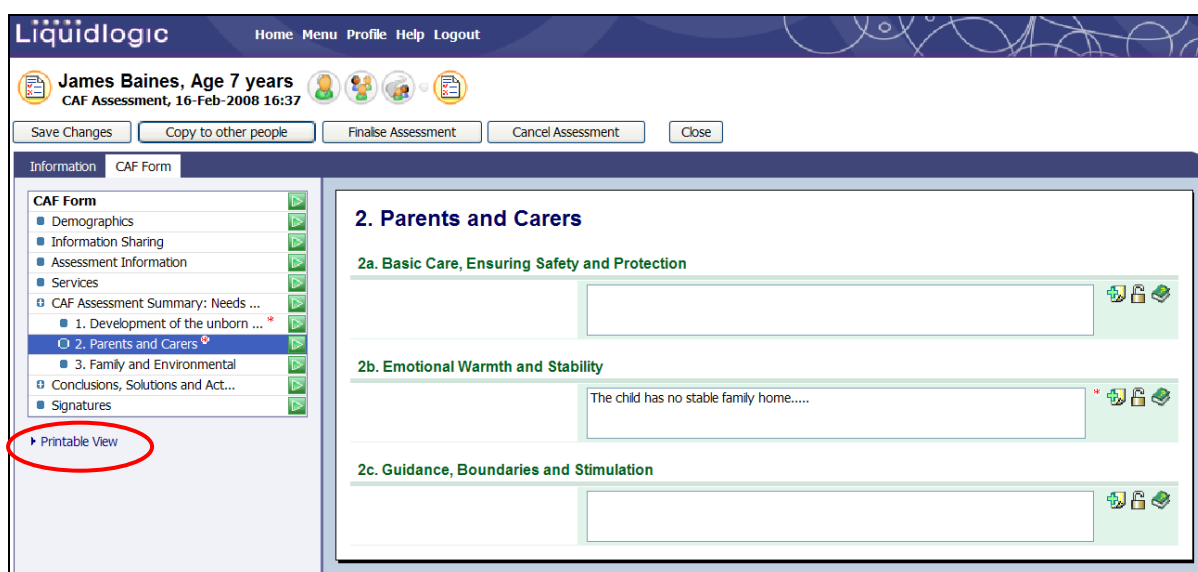


2. Click **Return to Form** after viewing the help text to return to the assessment.

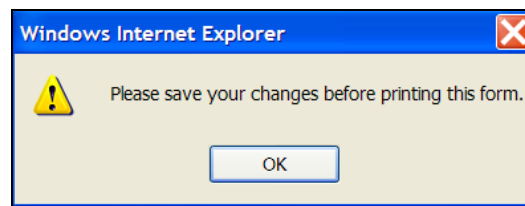
Printable View

A printable view of the assessment is accessible from the CAF Form tab, located below the sections (or headings) on the left hand side.

1. Click **Printable View** ensuring that the assessment has been saved first



2. The following prompt will appear if you have not saved the changes in your CAF assessment



3. Click **OK** and then click **Save Changes** before clicking **Printable View** link again

A screenshot of the CAF assessment interface. At the top, it says "James Baines, Age 7 years" and "CAF Assessment, 16-Feb-2008 16:37". Below this are several buttons: "Save Changes" (highlighted with a red box), "Copy to other people", "Finalise Assessment", "Cancel Assessment", and "Close". To the right of these buttons is a yellow status bar that says "Assessment Successfully Saved.". On the left side, there is a sidebar with a list of sections: "CAF Form", "Demographics", "Information Sharing", "Assessment Information", "Services", "CAF Assessment Summary: Needs ...", "1. Development of the unborn ...", "2. Parents and Carers" (highlighted with a red box), "3. Family and Environmental", "Conclusions, Solutions and Act...", and "Signatures". Below this list is a link labeled "Printable View" (also highlighted with a red box). The main content area shows the "2. Parents and Carers" section, which includes sub-sections "2a. Basic Care, Ensuring Safety and Protection", "2b. Emotional Warmth and Stability", and "2c. Guidance, Boundaries and Stimulation".

The following printing options are displayed:

A screenshot of the "Configure Printable Style of Assessment" dialog box. The dialog box has a title bar with "Liiquidlogic" and "Return To Form". The main content area is divided into three sections: "Configure Printable Style of Assessment", "Configure What to Print", and "Configure Sections to Print". Under "Configure Printable Style of Assessment", there are three checkboxes: "Use Large Font", "Print Landscape" (with a note "(remember to manually change the printers paper orientation to landscape)"), and "Print For Paper Form Fill". Under "Configure What to Print", there are two checkboxes: "Print Service User Details" and "Print Guidance Notes", both of which are checked. Under "Configure Sections to Print", there are two checkboxes: "Print Current Heading Only" and "Select Headings to Print". At the bottom of the dialog box are two buttons: "Cancel" and "Print Assessment".

4. Select the **Use Large Font** check box to print the assessment in a large font and then click **Print Assessment**

Configure Printable Style of Assessment

☒ **Use Large Font**

☐ **Print Landscape** (remember to manually change the printers paper orientation to landscape)

☐ **Print For Paper Form Fill**

Configure What to Print

☒ **Print Service User Details**

☒ **Print Guidance Notes**

Configure Sections to Print

☐ **Print Current Heading Only**

☐ **Select Headings to Print**

TIP: From the Printable View, use the **Small, Medium, Large** and **Largest** buttons to toggle the font size:

X Close Printable View | **Portrait** Landscape | Small Medium **Large** Largest | **Print page now**

5. Select the **Print Landscape** check box and click **Print Assessment** to print a form in a landscape format

NOTE: If the landscape format is chosen you will need to change you printer's paper orientation to landscape.

Configure Printable Style of Assessment

☐ **Use Large Font**

☒ **Print Landscape** (remember to manually change the printers paper orientation to landscape)

☐ **Print For Paper Form Fill**

Configure What to Print

☒ **Print Service User Details**

☒ **Print Guidance Notes**

Configure Sections to Print

☐ **Print Current Heading Only**

☐ **Select Headings to Print**

TIP: Use the **Portrait** or **Landscape** Orientation buttons to toggle this setting

X Close Printable View | **Portrait** Landscape | Small Medium **Large** Largest | **Print page now**

6. Select the **Print for Paper Form Fill** check box to increase the size of text boxes in the printable output to facilitate more room if completing this form using a paper-based copy and click **Print Assessment**

Configure Printable Style of Assessment

☐ Use Large Font
 ☐ Print Landscape (remember to manually change the printers paper orientation to landscape)
 ☒ **Print For Paper Form Fill**

Configure What to Print

☒ **Print Service User Details**
☒ **Print Guidance Notes**

Configure Sections to Print

☐ Print Current Heading Only
 ☐ Select Headings to Print

The example below shows the increased text box size allowing more room for paper based annotations:

Date of Consent	
Consent Date	16-Feb-2008
Comments	
Assessment Information	
What has led to this unborn infant, child, young person being assessed?	
Details of parents/carers/others	
There are no current relationships.	
Current family and home situation	
There are no current relationships. Current family and home situation	
Details of Key Agencies	
There are no current key agencies. Others present at assessment	

The **Print Service User Details** printable view option will automatically display the child/young person's basic demographic details on the printable view.

Details of Jim Davis, 8 1 year			
Family Name	Davis	Given Names	Jim
Approx. DOB	15-Jul-2008	Gender	Male
Ethnicity		Primary Language	
Primary Address	1 Selby Road Leeds West Yorkshire	Telephone	
		Mobile	

This option will be selected by default but can be disabled before clicking **Print Assessment** if required:

Configure What to Print

☒ **Print Service User Details**

☒ **Print Guidance Notes**

The **Print Guidance Notes** printable view option will include any instructions and guidance notes within the printed output. This option will be selected by default but can be disabled before clicking **Print Assessment** if required:

Configure What to Print

☒ **Print Service User Details**

☒ **Print Guidance Notes**

A user can also specify which particular sections of the assessment they wish to print.

- Select the **Print Current Heading Only** checkbox from the Printable View options and then click **Print Assessment** to ensure that only the selected section of the form, (i.e. the section on the left highlighted in blue) will appear on the printed output

Configure Sections to Print

☒ **Print Current Heading Only**

☐ Select Headings to Print

For example; the user may only wish to print the selected section 'Family and Environmental' from the CAF assessment.

Liqidlogic
Home Menu Profile Help Logout

James Baines, Age 7 years
 CAF Assessment, 16-Feb-2008 16:37

Information CAF Form

CAF Form

- Demographics
- Information Sharing
- Assessment Information
- Services
- CAF Assessment Summary: Needs ...
- 1. Development of the unborn ...
- 2. Parents and Carers
- 3. Family and Environmental**
- Conclusions, Solutions and Act...
- Signatures

3. Family and Environmental

3a. Family History, Functioning and Well-Being

3b. Wider Family

[Printable View](#)

8. Alternatively from the Printable View options choose the **Select Headings to Print** check box. This will allow the user to select individual sections of the form they wish to print instead of the entire assessment
9. Use the checkboxes to specify which sections of the assessment to print and then click the **Print Assessment** button

Configure Printable Style of Assessment

☐ Use Large Font
 ☐ Print Landscape (remember to manually change the printers paper orientation to landscape)
 ☐ Print For Paper Form Fill

Configure What to Print

☒ **Print Service User Details**
☒ **Print Guidance Notes**

Configure Sections to Print

☐ Print Current Heading Only
 ☒ **Select Headings to Print**

☐ CAF Form
 ☐ Information Sharing
 ☐ Assessment Information
 ☐ Services
 ☒ **CAF Assessment Summary: Needs and Strengths**

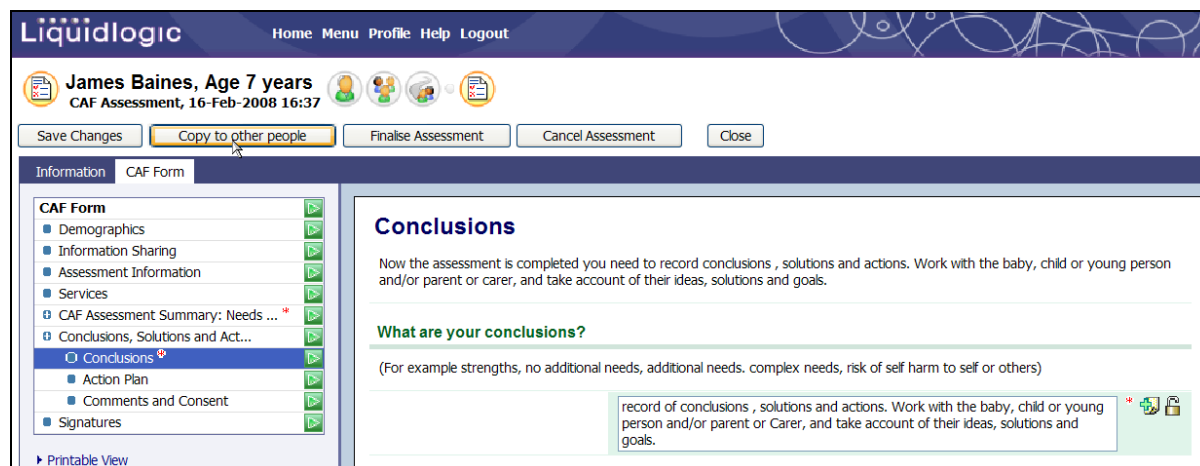
☒ **1. Development of the unborn baby, infant, child or young person**
☐ 2. Parents and Carers
 ☐ 3. Family and Environmental

☐ Conclusions, Solutions and Actions
 ☐ Conclusions
 ☒ **Comments and Consent**
☐ Signatures

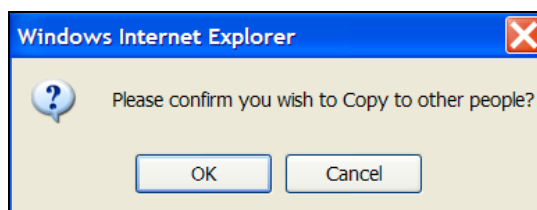
Copy to Other People

If appropriate, the CAF Assessment can be copied sideways to siblings of the child in question.

1. Click **Copy to Other People**



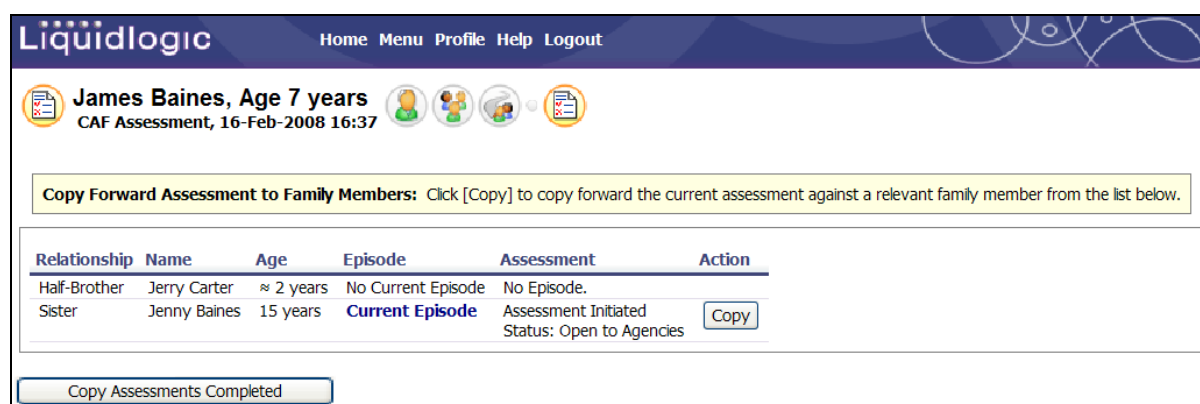
The following prompt will appear



2. Click **OK** to confirm your action and to continue with copying the assessment to other people/siblings. Alternatively, click **Cancel** to return to the original child's assessment without copying to other people

NOTE: the sibling must be recorded within the Relationships tab of the child/young person's demographic record to facilitate this. The sibling(s) must also have a current eCAF episode and the episode co-ordinator should have started the CAF assessment.

3. Click **Copy** for each of the relevant children
4. Click **OK** to confirm your action when prompted



Relationship	Name	Age	Episode	Assessment	Action
Half-Brother	Jerry Carter	≈ 2 years	No Current Episode	No Episode.	
Sister	Jenny Baines	15 years	Current Episode	Assessment Initiated Status: Open to Agencies	Copy

Every time the **Copy** button is selected a new contribution will be created. Additional information regarding the assessment for the other children will show as a **warning**. The warning highlights that the original child's assessment contribution is assign to the current user and as a result of choosing to

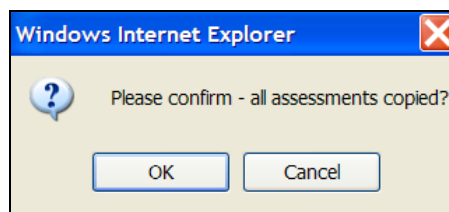
copy that assessment over to other children, the other children's assessments will be sent to the same user and the necessary tasks generated.

Copy Forward Assessment to Family Members: Click [Copy] to copy forward the current assessment against a relevant family member from the list below.

Relationship	Name	Age	Episode	Assessment	Action
Half-Brother	Jerry Carter	≈ 2 years	No Current Episode	No Episode.	
Sister	Jenny Baines	15 years	Current Episode	Assessment Initiated Status: Open to Agencies WARNING: A contribution assigned to you already exists. Copying will create a new contribution	Copy

Copy Assessments Completed

- Once the assessment has been copied to any other children select **Copy Assessments Completed** and click **OK** to confirm



You will then be returned to the original child's CAF Assessment

Conclusions

Now the assessment is completed you need to record conclusions , solutions and actions. Work with the baby, child or young person and/or parent or carer, and take account of their ideas, solutions and goals.

What are your conclusions?

(For example strengths, no additional needs, additional needs, complex needs, risk of self harm to self or others)

record of conclusions , solutions and actions. Work with the baby, child or young person and/or parent or Carer, and take account of their ideas, solutions and goals.

New tasks will appear in your work tray in relation to the children the CAF assessment was copied to.

James Baines, Age 7 years (1)		
No Due Date	James Baines, Age 7 years	CAF Assessment - Please complete your contribution to the CAF Assessment
Jenny Baines, Age 15 years (2)		
No Due Date	Jenny Baines, Age 15 years	CAF Assessment - Please complete CAF Assessment for Child
No Due Date	Jenny Baines, Age 15 years	CAF Assessment - Please complete your contribution to the Multi Agency CAF Assessment

NOTE: The episode coordinator for the other children will receive the following two tasks:

Jenny Baines, Age 15 years (2)		
No Due Date	Jenny Baines, Age 15 years	CAF Assessment - Please complete CAF Assessment for Child
No Due Date	Jenny Baines, Age 15 years	CAF Assessment - Please complete your contribution to the Multi Agency CAF Assessment

If you are not the episode coordinator but have access to the episode under the current consent statement then you will only have the following task:

No Due Date	Jenny Baines, Age 15 years	CAF Assessment - Please complete your contribution to the Multi Agency CAF Assessment
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6. Select the task ‘CAF Assessment – Please complete your contribution to the Multi Agency CAF Assessment’ for the child the original assessment was copied to

The CAF Assessment for the child is displayed with answers copied from the sibling’s assessment indicated with a . Although answers have been copied across the information can be amended.

Liüidlogic

Home Menu Profile Help Logout

Jenny Baines, Age 15 years

CAF Assessment, 17-Feb-2008 12:02



Save Changes

Copy to other people

Finalise Assessment

Cancel Assessment

Close

InformationCAF Form

CAF Form

Demographics

Information Sharing

Assessment Information

Services

CAF Assessment Summary: Needs ...

1. Development of the unborn ...

2. Parents and Carers

3. Family and Environmental

Conclusions, Solutions and Act...

Signatures

Printable View

1. Development of the unborn baby, infant, child or young person

1a. Health

General Health

information regarding James's health would go here.....

Physical development

more information here.....

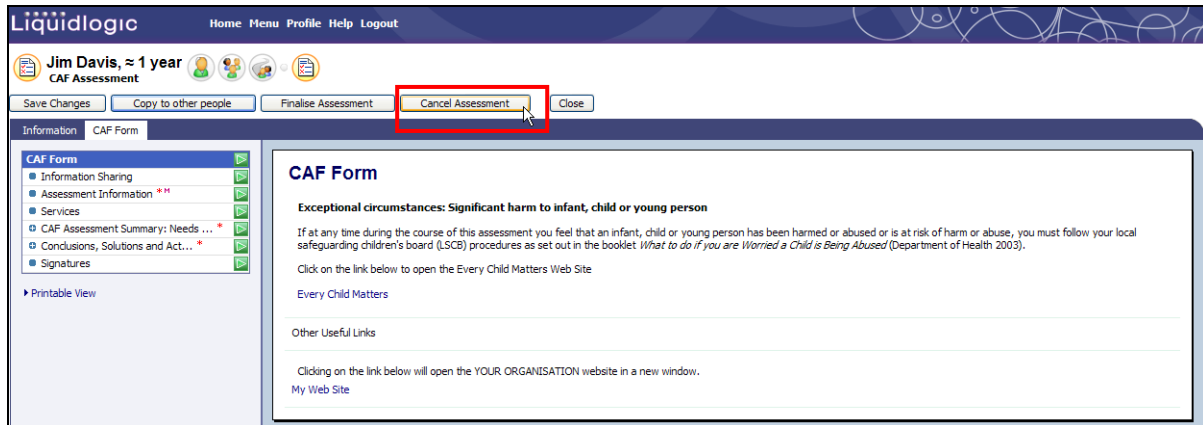
Speech, language and communication.

Liüidlogic	Commercially Confidential	eCAF Episode	Page 50 of 109
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Cancel Assessment

The facility to cancel assessments is only available to assessment contributors, an assessment can be cancelled at any time prior to being finalised, for example if started in error. The episode coordinator will not have the option to cancel the entire CAF episode for the child/young person.

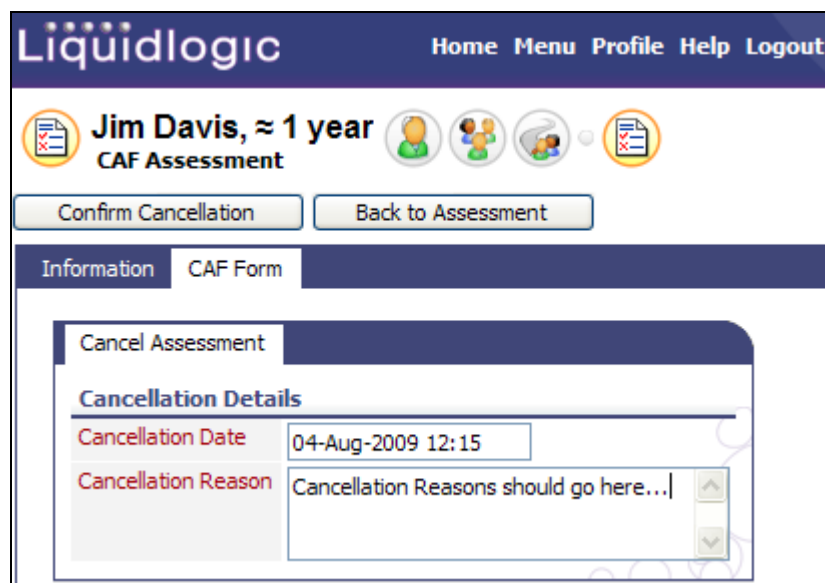
1. Click **Cancel Assessment**



The screenshot shows the Liqidlogic web application interface for a CAF Assessment. At the top, there is a navigation bar with 'Home', 'Menu', 'Profile', 'Help', and 'Logout'. Below this, the user's name 'Jim Davis, ≈ 1 year' and 'CAF Assessment' are displayed. A row of buttons includes 'Save Changes', 'Copy to other people', 'Finalise Assessment', 'Cancel Assessment' (highlighted with a red box), and 'Close'. The main content area is divided into two tabs: 'Information' and 'CAF Form'. The 'CAF Form' tab is active, showing a section titled 'CAF Form' with a sub-section 'Exceptional circumstances: Significant harm to infant, child or young person'. Below this, there is a paragraph of text and a link to 'Every Child Matters'. A 'Printable View' link is also visible in the left sidebar.

2. Enter **Cancellation Date** and **Reasons** and click **Confirm Cancellation** and then **OK**

TIP: Click **Back to Assessment** if you no longer wish to cancel the assessment



The screenshot shows the Liqidlogic web application interface for a CAF Assessment. At the top, there is a navigation bar with 'Home', 'Menu', 'Profile', 'Help', and 'Logout'. Below this, the user's name 'Jim Davis, ≈ 1 year' and 'CAF Assessment' are displayed. A row of buttons includes 'Confirm Cancellation' and 'Back to Assessment'. The main content area is divided into two tabs: 'Information' and 'CAF Form'. The 'CAF Form' tab is active, showing a section titled 'Cancel Assessment' with a sub-section 'Cancellation Details'. Below this, there are two input fields: 'Cancellation Date' with the value '04-Aug-2009 12:15' and 'Cancellation Reason' with the text 'Cancellation Reasons should go here...'. There are also up and down arrow buttons next to the 'Cancellation Reason' field.

This will also remove the CAF assessment contribution task from the work tray.

Finalise Assessment

Each CAF Assessment contribution form **must be finalised** (or cancelled) by each assigned contributor in order to allow the Episode Coordinator to progress to the next stage in the process. The following example shows four contributions to the CAF Assessment. Only one these contributions have been completed, the remaining three are still in progress or not started:

NOTE: If the Episode Coordinator is the only user who is recording contributions to the CAF Assessment they must finalise their contribution before they are able to progress to the next stage.

Liqidlogic Home Menu Profile Help Logout

Rosie Davis, ≈ 3 years **CMID**

Case Pathway

```

graph TD
    EpisodeStarted[Episode Started] --> ObtainConsent[Obtain Consent]
    ObtainConsent --> ConsentDenied[Consent Denied]
    ObtainConsent --> CAFAssessment[CAF Assessment]
    CAFAssessment --> CAFAssessmentAgreeing[CAF Assessment Agreeing Contributions]
    CAFAssessmentAgreeing --> Meeting[Meeting]
    Meeting --> TransferToICS[Transfer to ICS]
    TransferToICS --> EpisodeCompleted[Episode Completed]
    CAFAssessment --> ActiveEpisode[Active Episode]
    ActiveEpisode --> Meeting
    
```

CAF Assessment Task Details

All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.

Create a new CAF Assessment Contribution

Click here to select a user...

Draft CAF Assessment Contributions

- 26-Jul-2009 13:56, CAF Assessment by Social Worker 1 - Liquid Test Team (Assigned to You) [Print] In progress - unable to cancel
- 03-Aug-2009 11:37, CAF Assessment by Panos Worker - Liquid Test Team (Copy Forward) [Print] Cancel
- 04-Aug-2009 12:11, CAF Assessment by Admin Person - Liquid Test Team (Assigned to Admin Person) [Print] In progress - unable to cancel

Completed CAF Assessment Contributions

- 01-Aug-2009, CAF Assessment by Admin Person - Liquid Test Team (Completed) [Print]

1. Click **Finalise Assessment** and then **OK** to confirm

Liqidlogic Home Menu Profile Help Logout

Jim Davis, ≈ 1 year **CAF Assessment**

Save Changes Copy to other people Finalise Assessment Cancel Assessment Close

Information CAF Form

CAF Form

- Information Sharing [✓]
- Assessment Information * M [✓]
- Services [✓]
- CAF Assessment Summary: Needs ... * [✓]
- Conclusions, Solutions and Act... * [✓]
- Signatures [✓]

Printable View

CAF Form

Exceptional circumstances: Significant harm to infant, child or young person

If at any time during the course of this assessment you feel that an infant, child or young person has been harmed or abused or is at risk of harm or abuse, you must follow your local safeguarding children's board (LSCB) procedures as set out in the booklet *What to do if you are Worried a Child is Being Abused* (Department of Health 2003).

Click on the link below to open the Every Child Matters Web Site

[Every Child Matters](#)

Other Useful Links

Clicking on the link below will open the YOUR ORGANISATION website in a new window.

[My Web Site](#)

NOTE: Once an assessment is finalised it can no longer be edited

After this point you will not have the facility to return to the assessment to edit your answers.

The CAF Episode Coordinator will receive an alert in their work tray to indicate all assessment contributions have been completed and it is possible to proceed to the 'Agreeing Contributions' stage.

The screenshot shows the Liqidlogic Worktray interface. On the left is a sidebar with navigation links like 'Welcome', 'System Notices', 'User Options', and 'Diary and Addresses'. The main area displays a list of tasks with columns for 'Start Date', 'Child', and 'Task Description'. An alert box is visible, stating: 'Alerts for task CAF Assessment - Please complete CAF Assessment for Child. Proceed to Agreeing Contributions... - All contributions have been completed.... (Added 04-Aug-2009)'.

TIP: Click on the Alert to view the full details:

This dialog box provides details for the alert. It includes the following information:

- Alert Details**
- Date Issued:** 04-Aug-2009
- Assigned:** Task
- Subject:** Proceed to Agreeing Contributions
- Description:** All contributions have been completed, you may proceed to the Agreeing Contributions stage

Agreeing Contributions Stage

The following conditions would need to be met in order for the episode co-ordinator to complete the CAF assessment:-

- The episode co-ordinator would need to be listed as a contributor to the CAF Assessment and the episode coordinator **MUST** finalise their own contribution.
- Once the episode co-ordinator has recorded a contribution they would need to either proceed to the 'Agreeing Contributions' stage or allocate a **PROTOCOL** eCAF user or a number of users to contribute to the CAF assessment, allocate the user the right to contribute to the assessment and then await all contributors to finalise their individual assessment contributions.

NOTE: To create a new assessment contribution, please refer to the **CAF Assessment Contributions** section in this document.

1. Click **Contributions Completed**

The image shows a workflow diagram on the left and a screenshot of the 'CAF Assessment' interface on the right. The workflow diagram includes steps: Episode Started, Obtain Consent, Consent Denied, CAF Assessment, Active Episode, CAF Assessment Agreeing Contributions, Meeting, Transfer to ICS, and Episode Completed. The interface screenshot shows the 'Contributions Completed' button highlighted, with a message: 'All assessment contributions have been completed, you can now proceed on to the Agreeing Contributions stage.' Below this are links for 'Create a new CAF Assessment Contribution' and 'Completed CAF Assessment Contributions'.

2. Select the **hyperlink** for the CAF Assessment to agree and merge all contributions (even if there has only been a single contribution recorded)

The screenshot shows a workflow diagram on the left and a task details panel on the right. The workflow diagram includes steps: Episode Started, Obtain Consent, CAF Assessment, CAF Assessment Agreeing Contributions (highlighted with a yellow dashed border), Meeting, and Transfer to ICS. The task details panel, titled 'CAF Assessment Agreeing Contributions', shows a list of tasks. A task is highlighted with a red box: '24-Nov-2010 13:04, CAF Assessment by pmorgan - Liquid Test Team (Assigned to You) [Print]'. Below this, there is a link 'Back to: CAF Assessment'.

Alternatively, click on the task from the worktray to navigate to the 'CAF Assessment Agreeing Contributions' stage:

14-Aug-2009 15:07	Daisy Davis, 8 2 years	CAF Assessment - Agree Contributions
-------------------	------------------------	--------------------------------------

The CAF Assessment form will be displayed including all contributions. Answers entered by each individual assessment contributor can be identified by selecting sections indicated with a  symbol.

The screenshot shows the 'CAF Form' interface. On the left is a sidebar with a tree view containing sections like 'Information Sharing', 'Assessment Information', 'Services', 'CAF Assessment Summary: Needs', 'Conclusions, Solutions and Actions', and 'Signatures'. The 'Conclusions, Solutions and Actions' section is highlighted with a red box and a red arrow icon. The main area displays the 'CAF Form' content, including a section for 'Exceptional circumstances: Significant harm to infant, child or young person' and a link to 'Every Child Matters'.

3. Click **Populate Contribution Answers** to quickly merge information entered into the CAF assessment into the relevant fields

The screenshot shows the CAF Form interface. At the top, there are four buttons: 'Save Changes', 'Populate Contribution Answers' (highlighted with a mouse cursor), 'Finalise Assessment', and 'Close'. Below the buttons is a sidebar on the left with a 'CAF Form' section containing a list of items: 'Information Sharing', 'Assessment Information', 'Services', 'CAF Assessment Summary: Needs ...', '1. Development of the unborn ...', '2. Parents and Carers', '3. Family and Environmental', 'Conclusions, Solutions and Act...', and 'Signatures'. The main area on the right is titled '1. Development of the unborn baby, infant, child or young person' and contains a section '1a. Health' with three sub-sections: 'General Health', 'Physical development', and 'Speech, language and communication'. Each sub-section has a text area and a dropdown menu with the text 'Social Worker 1 (26-Jul-2009) details should go here...'.

This will merge previously entered data into the corresponding fields, see example below:

A close-up of a text field with a dropdown menu. The dropdown menu is open, showing the text 'Social Worker 1 (26-Jul-2009) details should go here...'.

TIP: Alternatively click the  icon against the appropriate contributor's comments to include individual answers from assessment contributor's as required.

A close-up of a text field with a dropdown menu. The dropdown menu is open, showing the text 'Social Worker 1 (26-Jul-2009) details should go here...'. A red box highlights the dropdown icon (a small triangle) to the left of the text.

NOTE: The answer from the assessment contribution will be included as an answer within the main CAF Assessment form; however the name of the contributor and date will be excluded. If required, the episode coordinator can edit these details to include such additional information.

- Navigate through the different sections of the CAF form (on the left-hand side) to update the necessary information as required and click **Save Changes**

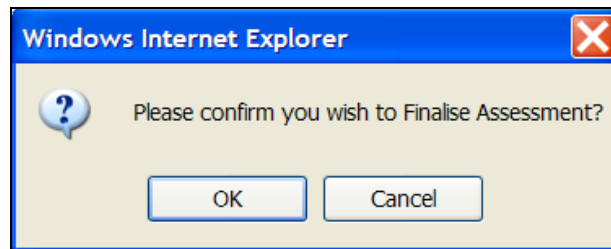
Recording Suggested Outcomes and completing the CAF

- Navigate to the **Suggested Outcomes** area within the CAF Assessment and select the **checkbox(es)** for the proposed action(s) and enter **reasons** for this

NOTE: This may differ depending on your customer configuration.

- Once complete click **Finalise Assessment**

- Click **OK** to confirm your action when prompted (or **Cancel** if required)



The Episode Coordinator will be prompted if the CAF assessment contains questions that have been answered by contributors but have been left blank within the CAF form as well as if written consent has still not been obtained, see example below:

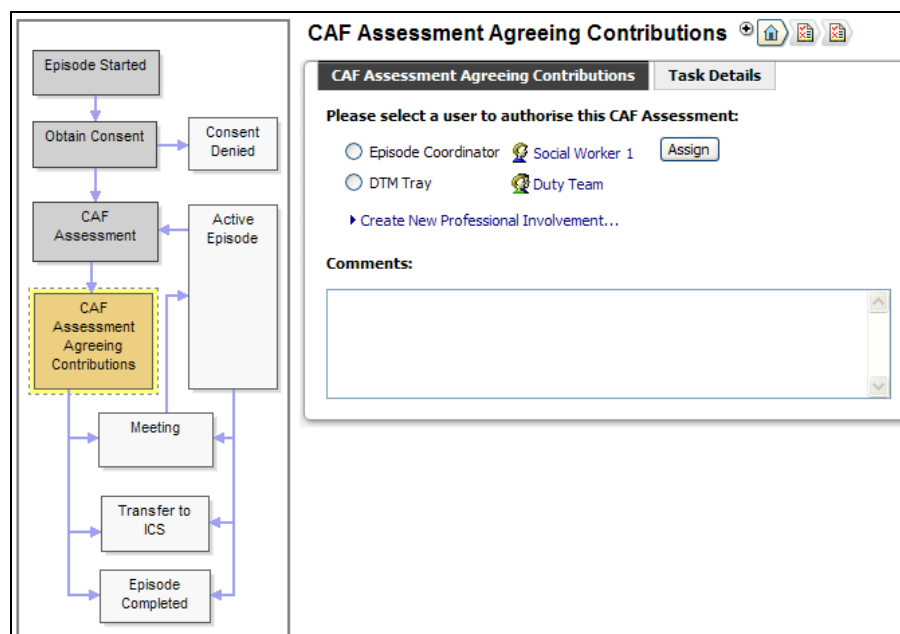
- Click **Continue** to disregard the prompt and continue to finalise the CAF assessment or alternatively click **Cancel** to return to the form to include further answers from assessment contributors



Once finalised the Episode Coordinator will be prompted to select who should authorise the CAF form.

- Select the radio button to specify where to send the authorisation of the CAF to and click **Assign**

NOTE: The options below may differ depending on your customer configuration.



Authorising the CAF Assessment

1. Select the CAF Assessment – Authorise task from the worktray:

14-Aug-2009 17:38	Daisy Davis, ≈ 2 years	CAF Assessment - Authorise
-------------------	------------------------	----------------------------

2. Select the hyperlink to open the CAF form

3. Read the CAF form and edit if required. Once reviewed click **Finalise Assessment** and then **OK** to confirm

NOTE: The authoriser of the CAF form will also be alerted if written consent has still not been obtained. This prompt is client configurable. Please consult your Liquidlogic project Manager for details.

4. Click **Continue** if prompted

Only verbal consent has been granted. Are you sure you want to continue? You must obtain written consent as soon as possible.

Information **CAF Form**

CAF Form

- Information Sharing
- Assessment Information * M
- Services
- CAF Assessment Summary: Needs ... *
- Conclusions, Solutions and Act... *
- Signatures

Printable View

CAF Form

Exceptional circumstances: Significant harm to infant, child or young person

If at any time during the course of this assessment you feel that an infant, child or young person has been harmed or abused or is at risk of harm or abuse, you must follow your local safeguarding children's board (LSCB) procedures as set out in the booklet *What to do if you are Worried a Child is Being Abused* (Department of Health 2003).

Click on the link below to open the Every Child Matters Web Site

[Every Child Matters](#)

Other Useful Links

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[My Web Site](#)

5. Click **Authorise** or **Request Further Information**, as required

```

graph TD
    A[Episode Started] --> B[Obtain Consent]
    B --> C[Consent Denied]
    B --> D[CAF Assessment]
    C --> D
    D --> E[CAF Assessment Agreeing Contributions]
    E --> F[Meeting]
    F --> G[Transfer to ICS]
    G --> H[Episode Completed]
    E --> I[Active Episode]
    I --> F
    I --> G
    I --> H
    
```

CAF Assessment Agreeing Contributions

CAF Assessment Agreeing Contributions

Task Details

Assessment Authorisation Stage: Review the completed Assessment and amend if applicable. Once satisfied finalise the Assessment and choose to Grant Authorisation or to Request Further Information.

View CAF Assessment by Social Worker 1 - Liquid Test Team (Awaiting Authorisation)

Amend

CAF Assessment Details

26-Jul-2009, CAF Assessment by Social Worker 1 - Liquid Test Team (Session Finalised) [Print]

Back to: CAF Assessment

NOTE: Clicking on **Request Further Information** will prompt the authoriser to enter comments why they are sending the CAF back to the Episode Coordinator

6. Enter comments as required and then click **Send Request**

TIP: the CAF form will be re-assigned back to the Episode Coordinator who will then have a task for this including the authoriser's comments in their worktray.

CAF Assessment Agreeing Contributions   

CAF Assessment Agreeing Contributions **Task Details**

Request Further Information: You have chosen to request further information for this Assessment. Please provide your reasons and click OK.

▶ View CAF Assessment by Social Worker 1 - Liquid Test Team (Awaiting Authorisation) ▶ Amend

Reason for requesting further information:
Reason for requesting further information should go here...

CAF Assessment Details
26-Jul-2009, CAF Assessment by Social Worker 1 - Liquid Test Team (Session Finalised) [Print]

Back to: CAF Assessment

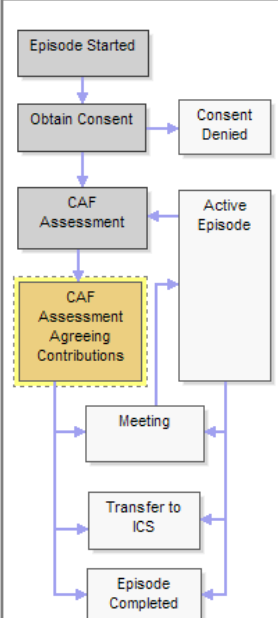
7. Alternatively click **Authorise** and then **OK** to confirm

Windows Internet Explorer 

 Please Confirm you wish to authorise this Assessment?

Assessment Type: CAF Assessment
Completed On: 26-Jul-2009

8. Click **Start** next to the authorised Outcome(s) and then **OK** to confirm



CAF Assessment Agreeing Contributions   

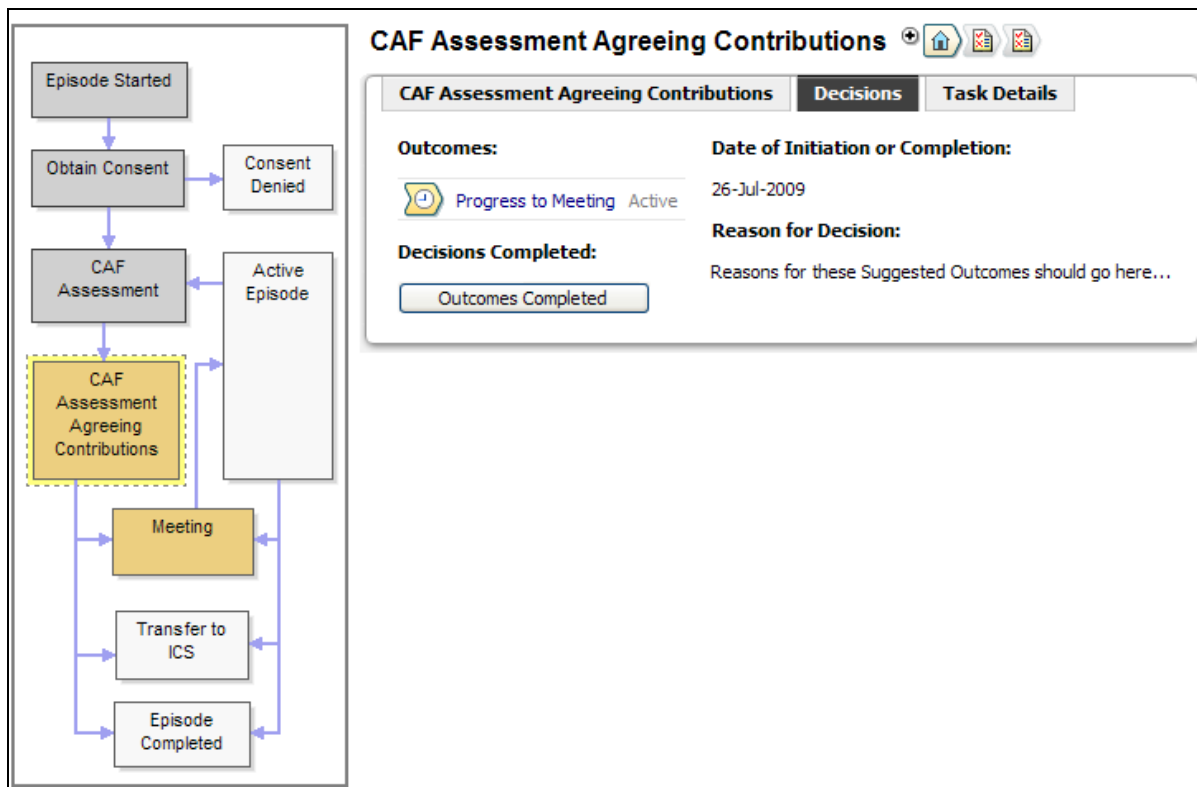
CAF Assessment Agreeing Contributions **Decisions** **Task Details**

Outcomes:
 Progress to Meeting (Assigned to Duty Team)

Date of Initiation or Completion:
26-Jul-2009

Reason for Decision:
This Outcome has not yet been Started, you may Start it now. ed Outcomes should go here...

9. Click **Outcomes Completed** and then **OK** to end the CAF assessment Agreeing Contributions stage on the Case pathway and continue with the new outcome



TIP: The Completed CAF Assessment can be viewed but not edited unless the decision to restart a new version of the CAF is selected. Please refer to the CAF Assessment or CAF Assessment Agreeing Contributions stage in the Case Pathway or the Activities tab to access the completed CAF.

Following the completion of the CAF Assessment Agreeing Contributions stage, one or more of these outcomes may be started:

Progress to Meeting	Episode Coordinator can start a further CAF Assessment
Transfer to ICS	Episode Coordinator can transfer the episode to ICS. Details including the CAF form can only be transferred if connected to a PROTOCOL ICS system
Episode Completed	Episode Coordinator can close the episode if no other outcome is to be pursued and no further action is required

NOTE: The list of outcomes may differ on your customer configuration. Please refer to your eCAF project Manager for further guidance.

CAF Outcome - Recording a Meeting

A task will be generated to organise the meeting. This may be sent to a group worktray rather than a person's individual worktray depending on your customer configuration. An additional task to write a pre-meeting report may also be generated depending on your customer configuration. Please refer to your Liquidlogic Project Manager for details.

14-Aug-2009 17:49	Daisy Davis, ≈ 2 years	Meeting - Write Pre-Meeting Report	Pickup
18-Aug-2009 17:49	Daisy Davis, ≈ 2 years	Meeting - Organise Meeting	Pickup

Writing the Pre Meeting Report

NOTE: This is only applicable to customers who have enabled this functionality in their eCAF system.

1. Click **Pickup** next to the **Meeting – Write Pre Meeting Report** task from the group worktray or select the task description if the task is assigned to you in your worktray

14-Aug-2009 17:49	Daisy Davis, ≈ 2 years	Meeting - Write Pre-Meeting Report	Pickup
-------------------	------------------------	------------------------------------	--------

2. Click **Write Pre Meeting Report**

The screenshot displays the eCAF Meeting interface. On the left, a workflow diagram shows the process from 'Episode Started' to 'Episode Completed', including steps like 'Obtain Consent', 'CAF Assessment', and 'Meeting'. A red box highlights the 'Meeting' step in the diagram. On the right, the 'Meeting' form is shown, with a red box highlighting the 'Write Pre-Meeting Report' link under the 'Pre-Meeting Report' section. The form includes sections for 'Meeting Details', 'Meeting Attendees', 'Excluded Attendees', and 'Meeting Notes'. The 'Meeting Details' section shows fields for 'Meeting Arranger' (Social Worker 1), 'Type of Meeting' (Meeting), 'Planned Meeting Date', 'Length in Minutes' (0), 'Location', and 'Meeting ID'. The 'Meeting Attendees' section shows 'No attendees have been defined...'. The 'Excluded Attendees' section shows 'No attendees have been excluded...'. The 'Meeting Notes' section shows 'The Meeting Notes have not been written' and 'It has been assigned to Duty Team'. The 'Pre-Meeting Report' section shows 'The Pre-Meeting Reports have not been written' and 'They have been assigned to Social Worker 1'. The 'Outcomes Form' section shows 'The Outcomes have not been written' and 'They have been assigned to Social Worker 1'. The 'Actions' section includes links for 'Complete Meeting' and 'Cancel Meeting'.

Meeting Meeting Task Details

Meeting (unscheduled)

Pre-Meeting Report

The Pre-Meeting Reports have not been written
They have been assigned to Social Worker 1

[Write Pre-Meeting Report](#)

[Re-Assign Report](#)

Meeting

Meeting Details

Meeting Arranger: Social Worker 1
Type of Meeting: Meeting
Planned Meeting Date:
Length in Minutes: 0
Location:
Meeting ID:
[Update Meeting Details and Scheduling](#)

Meeting Attendees

No attendees have been defined...

[Add Attendee](#)

Excluded Attendees

No attendees have been excluded...

[Add Excluded Attendee](#)

Meeting Notes

The Meeting Notes have not been written
It has been assigned to Duty Team

[Re-Assign Meeting Notes](#)

Outcomes Form

The Outcomes have not been written
They have been assigned to Social Worker 1

[Re-Assign Meeting Outcomes](#)

Actions

[Complete Meeting](#)

[Cancel Meeting](#)

3. Select the **hyperlink** to open the pre-meeting report

Meeting (unscheduled)

⊖ Pre-Meeting Report

▶ 26-Jul-2009, Action Pre-Meeting Report by Social Worker 1 - Liquid Test Team (Copy Forward) [Print]

▶ Re-Assign Report

⊖ Meeting

Meeting Details

Meeting Arranger	Social Worker 1
Type of Meeting	Meeting
Planned Meeting Date	
Length in Minutes	0
Location	
Meeting ID	

▶ Update Meeting Details and Scheduling

Outcomes Form

The Outcomes have not been written
They have been assigned to Social Worker 1

▶ Re-Assign Meeting Outcomes

Actions

▶ Complete Meeting
▶ Cancel Meeting

⊖ Meeting Attendees

No attendees have been defined...

▶ Add Attendee

⊖ Excluded Attendees

No attendees have been excluded...

▶ Add Excluded Attendee

⊖ Meeting Notes

The Meeting Notes have not been written
It has been assigned to Duty Team

▶ Re-Assign Meeting Notes

Warnings:

- ★ The prerequisite report has not been done (completion disabled)
- ★ The Date and Time for the meeting are not set
- ★ There are no Attendees for this meeting

4. Select the option to either start a **blank form** or to **copy forward** answers from previous selected assessments (use the checkboxes to specify which previous assessments)

Save Changes Finalise Assessment Close

Information Meeting Pre-Meeting Report

Copy Forward

Before starting the Assessment you have the option to copy forward the answers from the previous 1 Assessment for Daisy Davis, ≈ 2 years.

- Select each of the Assessments you wish to include the answers from and click 'Copy Forward Selected'.
- Alternatively, If you DO NOT want to copy forward any answers then click 'Start Blank' to begin the Assessment afresh.

Copy Forward Selected Start Blank

Created	Assessment	Started By
☐ 2 weeks 5 days ago	CAF Assessment (Sunday, 26 July 2009)	Social Worker 1

5. Enter the **date** the report was completed

6. Complete the sections, entering details as required and then click **Finalise Assessment** and then **OK**

The finalised Pre-Meeting report will have a status of completed within the meeting organiser. Select the hyperlink to view or print this as required:

Organising the Meeting

1. Select the **Meeting – Organise Meeting** task from the worktray

Please refer to the sections below for details on scheduling the meeting and inviting attendees.

Setting the Date and Time

1. To set a date/time for the Meeting click on **Update Meeting Details and Scheduling** from the Meeting Details section of the meeting organiser

The following screen allows you to enter details for the date, time and location of the meeting.

2. Enter the meeting date or click **Set from Calendar** to use the calendar to set the meeting date

3. Click on the **date** the meeting will be held. The selected date will be shaded in yellow, e.g. **18**
4. Click next to a timeslot on the calendar for the **start time**
5. Click next to a timeslot again on the calendar for the **end time**
6. Click **Confirm** to set the date and time of the meeting

Selecting a different month/year

To change the month in the calendar click on the month, in this example Dec:

Click on the month required.

This method can also be used when selecting the year.

You can also navigate through the months using the > or < symbols. Use > to move forward through the calendar and < to move backwards.

7. Enter the **location** of the meeting into the Location box
8. Click **Update**

Update Cancel - **Update:** Meeting planned for 14-Aug-2009 10:00

Update Meeting (unscheduled)

★ If the details of the meeting are changed, you must inform all invited attendees by sending further communication

Meeting Details

Type of Meeting	Meeting	
Planned Meeting Date	14-Aug-2009 10:00	Set From Calendar
Length in Minutes	90	
Location	Meeting Room One	
Comments		

☐ Please Confirm - you do not wish to set a meeting date

This will save the information under the Meeting Details area of the Meeting Organiser:

Meeting Details	
Meeting Arranger	Social Worker 1
Type of Meeting	Meeting
Planned Meeting Date	14-Aug-2009 10:00
Length in Minutes	90
Location	Meeting Room One
Meeting ID	
Update Meeting Details and Scheduling	

Adding Attendees

1. Click **Add Attendee**

Meeting Attendees

No attendees have been defined...

[Add Attendee](#)

2. Select the **radio button** to the left of the required attendee or use the relevant hyperlink to search for another professional, person record, key agency or relation

Create Cancel - **Meeting - Add New Attendee**

New Meeting Attendee

Key Agencies There are no Key Agencies defined Click to Add a Key Agency... Family Members ☐ Sister Rosie Davis, ≈ 3 years ☐ The Child Daisy Davis, ≈ 2 years Click to edit Family Members... Other Person Click to Search Other Persons... Other Professional Click to Search Other Professionals...	Chair ☐ Chairing the Meeting? Meeting Details Type of Meeting Meeting Scheduled Date 14-Aug-2009 10:00 Location Meeting Room One
--	---

- Once selected, click **Create** to add the attendee to the list of attendees in the meeting organiser screen

TIP: Select the **Chairing the Meeting** checkbox if this applicable to the attendee

Create **Cancel** - Meeting - Add New Attendee

New Meeting Attendee

Key Agencies
There are no Key Agencies defined
▶ Click to Add a Key Agency...

Family Members
☐ Sister Rosie Davis, ≈ 3 years
☐ The Child Daisy Davis, ≈ 2 years
 ▶ Click to edit Family Members...

Other Person
▶ Click to Search Other Persons...

Other Professional
☒ **Social Worker 1** Social Worker 1
 ▶ Click to Search Other Professionals...

Chair
☒ **Chairing the Meeting?**

Meeting Details
 Type of Meeting Meeting
 Scheduled Date 14-Aug-2009 10:00
 Location Meeting Room One

The Attendee will be added to the Meeting Organiser. Click **Add Attendee** again to repeat this process.

TIP: When adding yourself as an attendee you will automatically be identified as both invited and agreed to attend

Meeting Attendees									
	Role	Attendee	Chair	Invited	Agreed	Consulted	Present	Report	Minutes
1	Staff	Social Worker 1	☒		☒	-	-	-	-
▶ Add Attendee									

Meeting Attendee Options

- Select an attendee from the Meeting Organiser

Meeting Attendees									
	Role	Attendee	Chair	Invited	Agreed	Consulted	Present	Report	Minutes
1	Staff	Social Worker 1	☒		☒	-	-	-	-
2	Mother	Davinia Davis	-	-	-	-	-	-	-
▶ Add Attendee									

2. Use the various hyperlinks on the attendee details screen to **send invitations**, record **replies** to invitations, **update attendance**, record that a **pre meeting report has been sent** to the attendee (if applicable) or **remove the attendee**, as required

Daisy Davis, ~ 2 years Meeting - Attendee

Davinia Davis

Attendee Details	
Attendee	Davinia Davis
Role	Mother
Chairing the Meeting?	No

Meeting Details	
Type of Meeting	Meeting
Meeting Organiser	Social Worker 1 - Liquid Test Team
Scheduled Date	14-Aug-2009 10:00
Location	Meeting Room One

▶ [Open Pathway](#)

Method of Invitation: Letter
Will Attend Meeting?: Not Yet Responded

Attendance
Has Actually Attended:

Actions

- ▶ Set this Attendee to be the Chair
- ▶ Send Pre-Meeting Report
- ▶ Update Actual Attendance
- ▶ Remove Attendee
- ▶ Exclude Attendee from Meeting

Consultation
▶ [Enter/Update Consultation Details](#)

Communication

- ★ Invitation has not been sent to this Attendee
- ★ The Pre-Meeting Report has not been sent to this Attendee
- ▶ [Send Invitation](#)

TIP: Click **Open Pathway** or the  **Pathway** icon to return to the Meeting Organiser

NOTE: Please refer to the **eCAF Meetings** document for further details.

Cancelling the Meeting

If a meeting has been cancelled and rescheduled it is easier to simply change the date and time of the meeting rather than cancelling it.

1. From the Meeting organiser, click **Cancel Meeting** and then click **OK** to confirm

Meeting

Meeting Details	
Meeting Arranger	Social Worker 1
Type of Meeting	Meeting
Planned Meeting Date	14-Aug-2009 10:00
Length in Minutes	90
Location	Meeting Room One
Meeting ID	

▶ [Update Meeting Details and Scheduling](#)

★ There are no Attendees for this meeting

Outcomes Form

The Outcomes have not been written
They have been assigned to Social Worker 1

▶ [Re-Assign Meeting Outcomes](#)

Actions

- ▶ [Complete Meeting Outcomes](#)
- ▶ [Complete Meeting](#)
- ▶ [Cancel Meeting](#)

2. Enter the **Cancellation Date** and **Reason** and click **Update**

Recording Meeting Outcomes

1. From the Meeting Organiser click **Complete Meeting Outcomes** and click **OK**

Meeting

Meeting Details

Meeting Arranger: Social Worker 1
 Type of Meeting: Meeting
 Planned Meeting Date: 14-Aug-2009 10:00
 Length in Minutes: 90
 Location: Meeting Room One
 Meeting ID:

Outcomes Form

The Outcomes have not been written
 They have been assigned to Social Worker 1

Re-Assign Meeting Outcomes

Actions

Update Meeting Details and Scheduling

Complete Meeting Outcomes
 Complete Meeting
 Cancel Meeting

Meeting Attendees

	Role	Attendee	Chair	Invited	Agreed	Consulted	Present	Report	Minutes
1	Staff	Social Worker 1	✓	✓	✓	-	✓	-	-
2	Mother	Davinia Davis	-	✗	✓	-	✗	-	-

Add Attendee

Excluded Attendees

No attendees have been excluded...

Add Excluded Attendee

2. Enter the **Actual Meeting Date**
3. Select the **Delay** Reason, if applicable from the drop-down list
4. Click **Update**

Update Cancel - Complete Meeting

Update Meeting planned for 14-Aug-2009 10:00

Planned Meeting Details

Planned Meeting Date: 14-Aug-2009 10:00

Actual Meeting Details

Actual Meeting Date:

Delay Reason:

5. Click the Meeting Outcomes **hyperlink**

Meeting

Meeting Details

Meeting Arranger: Social Worker 1
 Type of Meeting: Meeting
 Planned Meeting Date: 14-Aug-2009 10:00
 Length in Minutes: 90
 Location: Meeting Room One
 Meeting ID:

Outcomes Form

The Pre-Meeting Report has not been sent to all Attendees

14-Aug-2009, Action Meeting Outcomes by Social Worker 1 - Liquid Test Team (Copy Forward) [Print]

Re-Assign Meeting Outcomes

Actions

Complete Meeting
 The Outcomes Forms must be completed and authorised before any other action

Actual Date

Actual Meeting Date: 14-Aug-2009

- Select the option to either start a **blank form** or to **copy forward** answers from previous selected assessments (use the checkboxes to specify which previous assessments)

Information
Meeting Outcomes

Copy Forward

Before starting the Assessment you have the option to copy forward the answers from the previous 1 Assessment for Daisy Davis, ≈ 2 years.

- Select each of the Assessments you wish to include the answers from and click 'Copy Forward Selected'.
- Alternatively, If you DO NOT want to copy forward any answers then click 'Start Blank' to begin the Assessment afresh.

Copy Forward Selected
Start Blank

Created	Assessment	Started By
☐ 2 weeks 5 days ago	CAF Assessment (Sunday, 26 July 2009)	Social Worker 1

- Complete the Meeting Outcomes/Action plan form as required. Click **Save Changes** and once completed click **Finalise Assessment** and **OK**

Save Changes
Finalise Plan
Close

Information
Plan

Plan
Action Plan
Printable View

Action Plan

Date: 24-Nov-2010

Child's Name(s): Jack Russell

Date of Birth: 15-Nov-2004

What type of meeting:

Locality: Central

Child's needs	What will the family do	What we will do	What we will do : Service	What we will do : Team	By when : Original Target Date	By when : Revised Target Date

Overall Progress since last Plan

				Comments	
Child					
Parent/Carer					
Lead Professional					

NOTE: Depending on your eCAF customer configuration your Meeting Outcomes form may be sent for authorisation, see example below:

Outcomes Form

14-Aug-2009, Action Meeting Outcomes by Social Worker 1 - Liquid Test Team (Completed) [Print]

Pending Report Authorisation (by Duty Team)

Pickup (Duty Team)

- Select the authorisation task from the worktray (or click **Pickup** if this is assigned to a group tray)

14-Aug-2009 10:00	Daisy Davis, ≈ 2 years	Meeting - Complete Meeting Outcomes - Please check the Report and Approve or Reject it	Pickup
-------------------	------------------------	--	--------

- Click **Approve Outcomes Report** or **Reject Outcomes Report** as required

Outcomes Form

14-Aug-2009, Action Meeting Outcomes by Social Worker 1 - Liquid Test Team (Completed) [Print]

▶ Approve Outcomes Report

▶ Reject Outcomes Report

- Click **Complete Meeting** once the Meeting Outcomes are completed (and authorised, if required) and then **OK** to confirm

Meeting

Meeting Details

Meeting Arranger	Social Worker 1
Type of Meeting	Meeting
Planned Meeting Date	14-Aug-2009 10:00
Length in Minutes	90
Location	Meeting Room One
Meeting ID	

★ The Pre-Meeting Report has not been sent to all Attendees

Outcomes Form

14-Aug-2009, Action Meeting Outcomes by Social Worker 1 - Liquid Test Team (Completed) [Print]

Approved by: Social Worker 1 on 14-Aug-2009

Actual Date

Actual Meeting Date	14-Aug-2009
---------------------	-------------

Actions

▶ Complete Meeting

Writing the Minutes

NOTE: This is only applicable to customers who have enabled this functionality in their eCAF system.

- Click **Pickup** next to the **Meeting – Write and Distribute Meeting Notes** task from the group worktray or select the task description if the task is assigned to you in your worktray

28-Aug-2009	Daisy Davis, ≈ 2 years	Meeting - Write and Distribute Meeting Notes	Pickup
-------------	------------------------	--	--------

- Click the **Write up Meeting Notes** link from the bottom of the Meeting Organiser

Meeting Notes

The Meeting Notes have not been written

It has been assigned to Social Worker 1

▶ Write up Meeting Notes

▶ Re-Assign Meeting Notes

- Select the option to either start a **blank form** or to **copy forward** answers from previous selected assessments (use the checkboxes to specify which previous assessments)

Information

Meeting Notes

Copy Forward

Before starting the Assessment you have the option to copy forward the answers from the previous 3 Assessments for Daisy Davis, ≈ 2 years.

- Select each of the Assessments you wish to include the answers from and click 'Copy Forward Selected'.
- Alternatively, If you DO NOT want to copy forward any answers then click 'Start Blank' to begin the Assessment afresh.

Copy Forward Selected
Start Blank

Created	Assessment	Started By
☐ Today	Action Meeting Outcomes (Friday, 14 August 2009)	Social Worker 1
☐ Today	Action Pre-Meeting Report (Friday, 14 August 2009)	Social Worker 1
☐ 2 weeks 5 days ago	CAF Assessment (Sunday, 26 July 2009)	Social Worker 1

- Enter the **date** the Minutes were completed and the details within the Meeting Notes section. Click **Save Changes** and once completed select the **Finalise Assessment** button

- Click **Close Meeting process, all tasks are complete** to end the Meeting

Meeting Outcome – Active Episode

The Review CAF Assessment outcome within the Meeting Outcomes form will display an active episode. The Episode Coordinator can use the Episode Details tabs and Demographics to record and update information as required.

NOTE: Please refer to the **eCAF Episode Details** document or **eCAF Demographics** document for further details.

Active Episode Decisions

1. Select the **Active Episode** task from the worktray to display the **Active Episode** Decisions tab

14-Aug-2009 19:24 | Daisy Davis, ≈ 2 years | Active Episode

Outcomes can be started manually from the decisions tab as required by using the Start or Restart buttons.

TIP: Ensure that the **date of initiating** the required outcome is correct before clicking 'Start/Restart'

The screenshot shows the 'Active Episode' interface. On the left is a workflow diagram with steps: Episode Started, Obtain Consent, CAF Assessment, CAF Assessment Agreeing Contributions, Meeting, Transfer to ICS, and Episode Completed. The 'Active Episode' box is highlighted. On the right, the 'Decisions' tab is active, showing a list of outcomes: Review CAF Assessment, Organise next meeting, Transfer to ICS, and Episode Completed. Each outcome has a 'Restart' or 'Start' button. The 'Review CAF Assessment' and 'Organise next meeting' outcomes have 'Restart' buttons, while 'Transfer to ICS' and 'Episode Completed' have 'Start' buttons. A red box highlights the 'Date of Initiation or Completion' section, which includes 'Today's Date' and 'Other Date' options, and a 'Reason for Decision' field.

Review CAF Assessment decision

1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Review CAF Assessment** outcome

This screenshot is a closer view of the 'Decisions' tab in the 'Active Episode' interface. It shows the 'Review CAF Assessment' outcome with its 'Restart' button highlighted. The 'Date of Initiation or Completion' section shows 'Today's Date' selected. The 'Reason for Decision' field is empty.

NOTE: Please refer to the CAF Assessment section in this document for further details.

Organise next Meeting decision

1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Organise next Meeting** outcome

The screenshot shows the 'Active Episode' interface with the 'Decisions' tab selected. The 'Outcomes' section lists four items: 'Review CAF Assessment' (Restart, Assigned to Social Worker 1), 'Organise next meeting' (Restart, Assigned to Duty Team), 'Transfer to ICS' (Start, Assigned to Yourself), and 'Episode Completed' (Start, Assigned to Yourself). The 'Date of Initiation or Completion' is set to 'Today's Date'. The 'Reason for Decision' field is empty.

NOTE: Please refer to the Meeting section in this document for further details.

Transfer to ICS decision

1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Transfer to ICS** outcome

The screenshot shows the 'Active Episode' interface with the 'Decisions' tab selected. The 'Outcomes' section lists four items: 'Review CAF Assessment' (Restart, Assigned to Social Worker 1), 'Organise next meeting' (Restart, Assigned to Duty Team), 'Transfer to ICS' (Start, Assigned to Yourself), and 'Episode Completed' (Start, Assigned to Yourself). The 'Date of Initiation or Completion' is set to 'Today's Date'. The 'Reason for Decision' field is empty.

NOTE: Please refer to the **Transfer to ICS** section in this document for further details.

Episode Completed decision

1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Episode Completed** outcome

The screenshot shows the 'Active Episode' window with the 'Decisions' tab selected. The 'Outcomes' section lists four items: 'Review CAF Assessment' (Restart, Assigned to Social Worker 1), 'Organise next meeting' (Restart, Assigned to Duty Team), 'Transfer to ICS' (Start, Assigned to Yourself), and 'Episode Completed' (Start, Assigned to Yourself). The 'Date of Initiation or Completion' section has 'Today's Date' selected. The 'Reason for Decision' section has a text area and a '(reset)' link.

Active Episode	Decisions	Task Details
Outcomes:		
	Review CAF Assessment	Restart (Assigned to Social Worker 1)
	Organise next meeting	Restart (Assigned to Duty Team)
	Transfer to ICS	Start (Assigned to Yourself)
	Episode Completed	Start (Assigned to Yourself)

Date of Initiation or Completion:

☒ **Today's Date**

☐ Other Date: (reset)

Reason for Decision: (reset)

NOTE: Please refer to the **Episode Completed** section in this document for further details.

CAF Outcome – Episode Completed

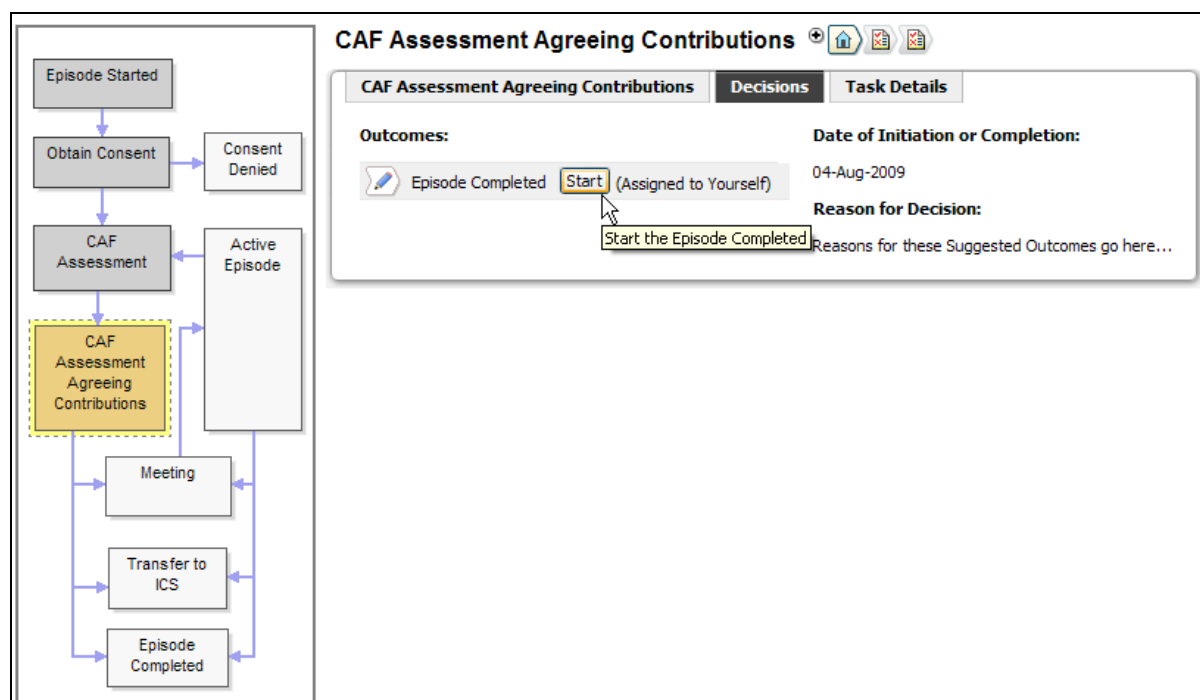
If no further activity is required in relation to a current episode in **PROTOCOL** eCAF, the Episode Coordinator can complete the episode. The completion of an eCAF Episode will prevent the episode coordinator from starting any further CAF Assessments

1. Select the **Episode Completed** Outcome from the CAF assessment

Suggested Outcomes	☐ Progress to Meeting ☐ Transfer to ICS ☒ Episode Completed
Reasons for these Suggested Outcomes	Reasons for these Suggested Outcomes go here...

TIP: Alternatively this may be selected as an outcome from the **Active Episode Decisions** tab.

2. Once authorised, click **Start** next to the **Episode Completed** outcome and **OK** to confirm



- Click **Outcomes Completed** and **OK** to confirm

CAF Assessment Agreeing Contributions

CAF Assessment Agreeing Contributions
Decisions
Task Details

Outcomes:

Episode Completed Thank you, this task is in your worktray.

Decisions Completed:

Outcomes Completed

Date of Initiation or Completion:

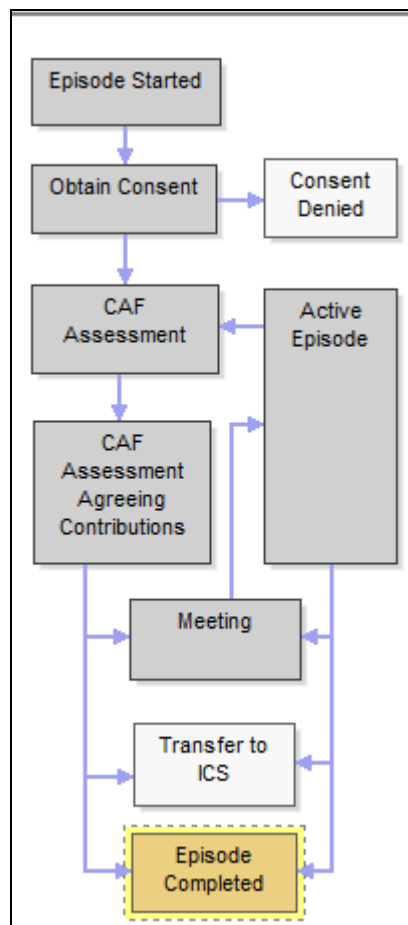
04-Aug-2009

Reason for Decision:

Reasons for these Suggested Outcomes go here...

The **Episode Completed** stage on the eCAF pathway is activated and a corresponding task will be generated in the Episode Coordinator's worktray:

No Due Date (1)		
No Due Date	Jack Russell, ≈ 6 years	Episode Completed



4. Select the Episode Completed task or box from the Case Pathway (as above)
5. Enter **End Date**
6. Select the **End Reason** from the picklist
7. Enter **Details of work carried out** and select the **Success Rating** from the picklist
8. Select the **Final Vulnerability Level** and click **Complete Episode**

Episode Completed

Episode Completed **Task Details**

Complete Episode Reset Cancel

Update Episode 01-Feb-2010

Start and End Date

Episode Date 01-Feb-2010
Reason Development of Baby, Child or Young Person - Learning
Original Reason Details here
End Date today

End Reason

End Reason Action Plan Completed NFA
Details of Work Carried Out details here

Success Rating 1: Most Successful

Vulnerability

Given your knowledge of the child please rate the child's vulnerability on a scale of 1-4 using the Threshold Criteria
Final Vulnerability Level 1 - Universal

Back to: [Active Episode](#)

The eCAF Episode has now been completed, and the episode pathway will automatically update to reflect this.

TIP: The child's vulnerability level will be indicated on the child's **Personal tab** in the demographics; however a history of the Vulnerability level can also be accessed and updated from the **Further details tab** in the demographics, see examples below:

Personal **Further Details** **Relationships** **Key Agencies** **Episode History** **Documents** **Case Notes** **Standalone Forms**

Name & Gender

Identifier 456
Title
Surname Russell
Forename Jack
Gender Male

Age / Date of Birth

Approx. DOB 15-Nov-2004
Age ≈ 6 years
Approximate Age Yes
Unborn Child No

Update Personal Details

Send a message about this Person
Copy to Briefcase

Other Names

Add Other Name
Mark this Record as a Duplicate

Addresses

Main/Home 1 Leeds Road
from 15-Nov-2004 Leeds LS25 1NB

Address History / Update Addresses

Locality

Locality Central
Locality Notes

Telephones

Add Contact Number / View Historic Numbers...

Disability

Does this person have a disability?
Is this person on the Children's Disability Register?
See Further Details for disability details

SEN

Has special education needs

Important Information

Previous episode, from 01-Feb-2010 to 24-Nov-2010
Previous episode, from 01-Jan-2010 to 01-Jan-2010
This child has a retention date of 15-Nov-2022 (Child becomes 18)

Vulnerability Level

Current Vulnerability Level 1 - Universal

Start New Pre-Assessment Form

Start

Actions

New ECAF Episode
New Document

TIP: The Vulnerability level can only be updated whilst the episode is still active:

Personal	Further Details	Relationships	Key Agencies	Episode History												
Disability ☒ Does this person have a disability? ☒ Is this person on the Children's Disability Register?																
Disabilities No Disabilities Recorded Add a Disability																
Vulnerability History <table border="1"> <thead> <tr> <th></th> <th>Start Date</th> <th>End Date</th> <th>Vuln. Level</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>31-Jul-2009</td> <td>14-Aug-2009</td> <td>5</td> </tr> <tr> <td>2</td> <td>14-Aug-2009</td> <td></td> <td>3</td> </tr> </tbody> </table>						Start Date	End Date	Vuln. Level	1	31-Jul-2009	14-Aug-2009	5	2	14-Aug-2009		3
	Start Date	End Date	Vuln. Level													
1	31-Jul-2009	14-Aug-2009	5													
2	14-Aug-2009		3													
Ethnicity & Religion Ethnicity If Other Please Specify																
Nationality Immigration Status																
Religion Religion																
Language / Preferred method of communication Interpreter Required? Add Language																
Other Details Other Details																
Retention Retention Code Episode closed for 6 years Calculated Date 14-Aug-2015 Open Retention Record Set / Calculate Retention Date																
Archived / Paper File Add or View Paper File Records																
Last Modified Modified By Social Worker 1 - Liquid Test Team Modified Date 14-Aug-2009 20:02 Update Personal Details																

Recording an eCAF Retention record

Once an eCAF Episode is completed a task will be generated to record the retention details. Both the fact that the episode is completed and that the child has a retention date will be highlighted within the 'Important information' area of the Personal tab within the Demographics:

Liquidlogic		Home	Menu	Profile	Help	Logout																																																																	
Donna Davis, ≈ 7 years CMD																																																																							
Basic Demographics																																																																							
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1. Select the **Retention – Update the Retention Schedule** task from the worktray

14-Aug-2009 20:02	CMD Donna Davis, ≈ 7 years	Retention - Update the retention schedule
-------------------	-----------------------------------	--

- Record the Retention details such as action on expiration, notes and paper file location, as required and then click **Finalise**

TIP: The default Retention Code and Date can be adjusted if required before clicking Finalise.

Liquidlogic Home Menu Profile Help Logout

Finalise Save Cancel - **Update:** Donna Davis, ~ 7 years (15-Jul-2002)

Retention Record

Retention Details

Retention Status Draft

Calculated Retention Details

Calculated Code Episode closed for 6 years
 Calculation Retention Date is calculated to be the End Date of the last Episode (14-Aug-2009) offset by 6 years 6 years
 Calculated Date 14-Aug-2015

Actual Retention Details

Retention Code Episode closed for 6 years
 Retention Date 14-Aug-2015
 Action on Expiration Begin Purge Process

Notes

Retention Notes Retention Notes goes here...

Paper Files

Paper File Location Paper File Location goes here...

Audit

Requested By
 Date Requested

TIP: Finalised Retention details can be accessed and updated from the **Further Details** tab:

Personal Further Details Relationships Key Agencies Episode History

Disability

☒ Does this person have a disability?
☒ Is this person on the Children's Disability Register?

Disabilities

No Disabilities Recorded
 Add a Disability

Vulnerability History

	Start Date	End Date	Vuln. Level
1	31-Jul-2009	14-Aug-2009	5
2	14-Aug-2009		3

Ethnicity & Religion

Ethnicity
 If Other Please Specify

Nationality

Immigration Status

Religion

Religion

Language / Preferred method of communication

Interpreter Required?
 Add Language

Other Details

Retention

Retention Code Episode closed for 6 years
 Calculated Date 14-Aug-2015
 Notes Retention Notes goes here...
 Open Retention Record
 Set / Calculate Retention Date

Archived / Paper File

Add or View Paper File Records

Last Modified

Modified By Social Worker 1 - Liquid Test Team
 Modified Date 14-Aug-2009 20:02
 Update Personal Details

Manually ending an eCAF Episode

An active eCAF episode may be ended manually, if required. For example if a record has been transferred to ICS the episode may need to be eventually ended in eCAF.

1. From the case pathway select the **Episode Completed** box

The screenshot shows the Liqidlogic eCAF interface. At the top, there's a navigation bar with 'Home', 'Menu', 'Profile', 'Help', and 'Logout'. Below this, the user is logged in as 'Ann Example, ≈ 3 years' with a 'Case Pathway' icon. On the left, a flowchart shows the episode lifecycle: 'Episode Started' leads to 'Obtain Consent' (highlighted with a dashed yellow border), which can lead to 'Consent Denied' or 'Active Episode'. 'Active Episode' leads to 'CAF Assessment', then 'CAF Assessment Agreeing Contributions', then 'Meeting', then 'Transfer to ICS', and finally 'Episode Completed' (highlighted with a red border and a mouse cursor). On the right, the 'Obtain Consent' form is displayed. It has tabs for 'Obtain Consent', 'Restart', and 'History'. The 'Obtain Consent' tab is active, showing a 'Current Consent Statement, 01-Aug-2009'. The form includes sections for 'Person Giving Consent' (with questions about the child's age and understanding, and parental agreement), 'Access Control' (showing restrictions and access for 'Social Worker 1 - Liquid Test Team'), and 'Date of Consent' (with a consent date of '01-Aug-2009' and a 'View Episode Details' link).

2. Enter the **date** of initiating the Episode Closure and **reasons** for starting this step manually
3. Click **Start this Step**

The screenshot shows the 'Episode Completed' form. It has a title 'Episode Completed' with a plus icon and a home icon. Below the title, it says 'This step has not been initiated.' and there is a 'Start this Step' button. The form then asks for the 'date of initiation' with a text input field containing '16-Aug-2009'. It also asks for the 'reason for starting manually' with a large text area containing the placeholder text 'reason for starting this should go here...|'. There are up and down arrow icons on the right side of the text area.

The Episode Completed details will be displayed. Please refer to the earlier **CAF Outcome – Episode Completed** section in this document for further information.

Ann Example, ≈ 3 years
Case Pathway

Episode Completed

Episode Completed

Task Details

Update Episode 01-Aug-2009

Start and End Date

Episode Date	01-Aug-2009 11:49
Reason	Other - Request for specific service
Original Reason	Additional Notes
End Date	

End Reason

End Reason	
Details of Work Carried Out	
Success Rating	

Vulnerability

Given your knowledge of the child please rate the child's well-being on a scale of 1-6 where:
1: The child/young person is doing well enough and you are not worried about their well being
6: You have significant worries about the child/young person's well being

Final Vulnerability Level	4
---------------------------	--------------------------------

Episode Started

Obtain Consent

CAF Assessment

CAF Assessment Agreeing Contributions

Meeting

Transfer to ICS

Episode Completed

Consent Denied

Active Episode

Viewing Previous eCAF Episodes

All previous eCAF episodes are highlighted on the child/ young person's demographics record.

1. Click on the **Previous episode** link from under the **Important Information** section on the Personal tab

Liqidlogic Home Menu Profile Help Logout

Anne Example, ~ 3 years **CMD**

Basic Demographics

Personal Further Details Relationships Key Agencies Episode History

Name & Gender
 Identifier: 382
 Title:
 Surname: Example
 Forename: Anne
 Gender:

Age / Date of Birth
 Approx. DOB: 15-Jul-2006
 Age: ~ 3 years
 Approximate Age: Yes
 Unborn Child: No

Update Personal Details
 Send a message about this Person
 Copy to Briefcase
 Add Other Name

Addresses
 Main/Home from 15-Jul-2006
 10 Klin Lane
 Eccleston
 St. Helens
 Merseyside
 WA10 4RJ

Address History / Update Addresses

Telephones
 Add Contact Number / View Historic Numbers...

Locality
 Locality: HD

Disability
☒ Does this person have a disability?
☒ Is this person on the Children's Disability Register?
 See Further Details for disability details

SEN
☐ Has special education needs

Important Information
 Previous episode, from 17-Jul-2009 to 17-Jul-2009
 This child has a retention date of 17-Jul-2015 (Episode closed for 6 years)

Vulnerability Level
 Current Vulnerability Level: 6

Start New Pre-Assessment Form
 Start

Actions
 You cannot create a document for this person unless there is an open Episode.
 New ECAF Episode

The eCAF Episode Completed pathway will be displayed. The Episode Details tabs can also be accessed as read-only from here:

NOTE: Please refer to the **eCAF – Episode Details** document for more information.

Liqidlogic Home Menu Profile Help Logout

Anne Example, ~ 3 years **CMD**

Case Pathway

Episode Completed

Episode Completed History

Episode Details Activities Involvements Case Notes Consent Access Requests

Episode Details
 Episode Coordinator: Helen Shaw - Liquid Test Team
 Episode Date: 17-Jul-2009 11:19
 End Date: 17-Jul-2009
 Success Rating: 4
 Status:
 Reason: Family and Environment - Family History & Well-being
 Additional Notes: details go here...

Episode Shielding
 Shielded: No
 Reason for Shielding:

Consent
 Restrictions: Access is ONLY available to:
 Helen Shaw - Liquid Test Team

Back to: Active Episode

Flowchart:
 Episode Started → Obtain Consent → CAF Assessment → CAF Assessment Agreeing Contributions → Meeting → Transfer to ICS → Episode Completed
 Obtain Consent → Consent Denied
 CAF Assessment → Active Episode
 Meeting → Active Episode
 Transfer to ICS → Active Episode
 Episode Completed → Active Episode

CAF Outcome – Transfer to ICS

NOTE: This outcome may not be available in your local eCAF customer configuration. The Transfer to ICS outcome is only fully compatible with the **PROTOCOL** ICS system. Please refer to your Liquidlogic Project Manager for further details.

Following the CAF Assessment or meeting the child/young person's episode may need to be transferred to the Integrated Children's System (ICS). This may also be started as an outcome from the Decisions tab of the active CAF episode.

1. Select the **Transfer to ICS** outcome from the CAF assessment

Suggested Outcomes	☐ Progress to Meeting ☒ Transfer to ICS ☐ Episode Completed
Reasons for these Suggested Outcomes	Reasons for these Suggested Outcomes should go here...

TIP: Alternatively this may be selected as an outcome from the **Active Episode Decisions** tab.

2. Once authorised, click **Start** next to the **Transfer to ICS** outcome and **OK** to confirm

```
graph TD
    ES[Episode Started] --> OC[Obtain Consent]
    OC --> CD[Consent Denied]
    OC --> CA[CAF Assessment]
    CA --> AAC[CAF Assessment Agreeing Contributions]
    AAC --> M[Meeting]
    M --> TI[Transfer to ICS]
    TI --> EC[Episode Completed]
    AE[Active Episode] --- AAC
    AE --- M
    AE --- TI
    AE --- EC
```

CAF Assessment Agreeing Contributions

CAF Assessment Agreeing Contributions | **Decisions** | **Task Details**

Outcomes:

Transfer to ICS

Start (Assigned to Yourself)

Date of Initiation or Completion:
16-Aug-2009 11:49

Reason for Decision:
Reasons for these Suggested Outcomes should go here...

- Click **Outcomes Completed** and **OK** to confirm

CAF Assessment Agreeing Contributions

CAF Assessment Agreeing Contributions
Decisions
Task Details

Outcomes:

Transfer to ICS Thank you, this task is in your worktray.

Decisions Completed:

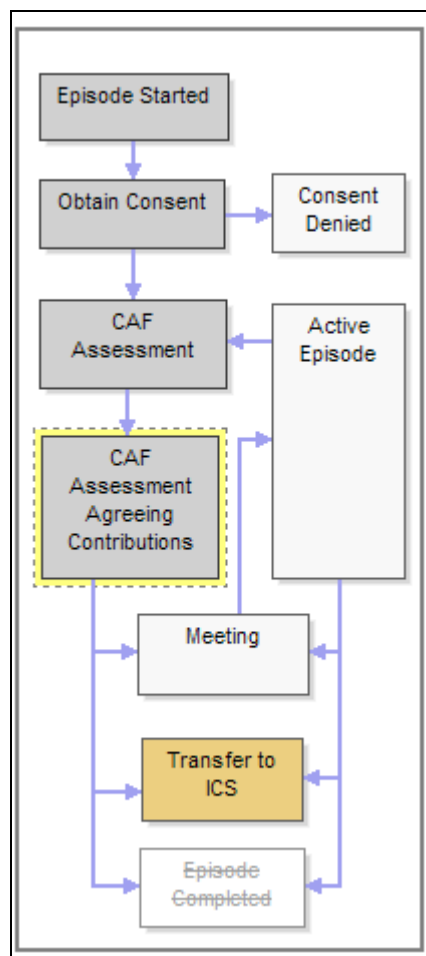
Outcomes Completed

Date of Initiation or Completion:
16-Aug-2009 11:49

Reason for Decision:
Reasons for these Suggested Outcomes should go here...

The **Transfer to ICS** stage on the eCAF pathway is activated and a corresponding task will be generated in the Episode Coordinator's worktray:

No Due Date	Ann Example, ≈ 3 years	Transfer to ICS
-------------	------------------------	-----------------



- Select the **Transfer to ICS** task or box from the Case Pathway (as above)

5. Enter **Transfer Date**
6. Select the **Are the Parents aware of this contact** checkbox, as required
7. Select the **Do you wish to remain anonymous?** checkbox, as required
8. Enter **Comments** to explain why the case is to be transferred to ICS
9. Click **Create Record** alternatively if you do not wish to submit these details click **Cancel**

Transfer to ICS

Transfer to ICS
Task Details

Create Record
Reset
Cancel

New Record of Transfer

Transfer Details

Date of Transfer today

☒ **Are the parents aware of this contact?**

☐ Do you wish to remain anonymous?

Comments CAF assessment has identified an escalated need for children's services support under s.17 to safeguard this child

[Back to: CAF Assessment Agreeing Contributions](#)

This will complete the Transfer to ICS process on the Case Pathway:

Transfer to ICS

Transfer to ICS
History

Record of Transfer to ICS, 16-Aug-2009

Transfer Details

Date of Transfer	16-Aug-2009
Are the parents aware of this contact?	Yes
Do you wish to remain anonymous?	No
Comments	CAF assessment has identified an escalated need for children's services support under s.17 to safeguard this child

[View Episode Details](#)

[Back to: CAF Assessment Agreeing Contributions](#)

Once a child/young person's record has been transferred to ICS this will be identified in the Important Information area of their Personal tab:

NOTE: the episode will still remain active within the **PROTOCOL** eCAF system.

Personal Further Details Relationships Key Agencies Episode History

Name & Gender
 Identifier 387
 Title
 Surname Example
 Forename Ann
 Gender Female

Age / Date of Birth
 Approx. DOB 15-Aug-2006
 Age ≈ 3 years
 Approximate Age Yes
 Unborn Child No

► Update Personal Details
 ► Send a message about this Person
 ► Copy to Briefcase

Other Names
 ► Add Other Name

Addresses
 Main/Home 1 Selby Road
 from 15-Aug-2006 Leeds
 West Yorkshire
 LS25 1NB
 ► Address History / Update Addresses

Telephones
 ► Add Contact Number / View Historic Numbers...

Locality
 Locality

Disability
☐ Does this person have a disability?
☐ Is this person on the Children's Disability Register?
See Further Details for disability details

SEN
☐ Has special education needs

Important Information
 * Current episode, started 01-Aug-2009
 * This episode was transferred to ICS on 16-Aug-2009

Vulnerability Level
 Current Vulnerability Level 4

Start New Form
 [Dropdown Menu]
 Start

Actions
 ► New Document

TIP: The Episode Closure step can be started manually if the episode should also be ended in the **PROTOCOL** eCAF system. Please refer to the '**Manually ending an eCAF Episode**' section in this document for details.

The **Activities** tab on the eCAF Episode will be automatically updated to reflect the episode has been transferred to ICS.

Episode Details **Activities** Involvements Case Notes Services Consent Access Requests

Assessments and Forms

	Assessment Date	Assessment Type	Assessor	Status
1	16-Aug-2009 11:49	CAF Assessment	Social Worker 1	Completed
2	16-Aug-2009 11:49	CAF Assessment	Social Worker 1	Completed

Standalone Assessments
 No Standalone Assessments have been completed

Family Support Meetings
 No Family Support Meetings have been started.

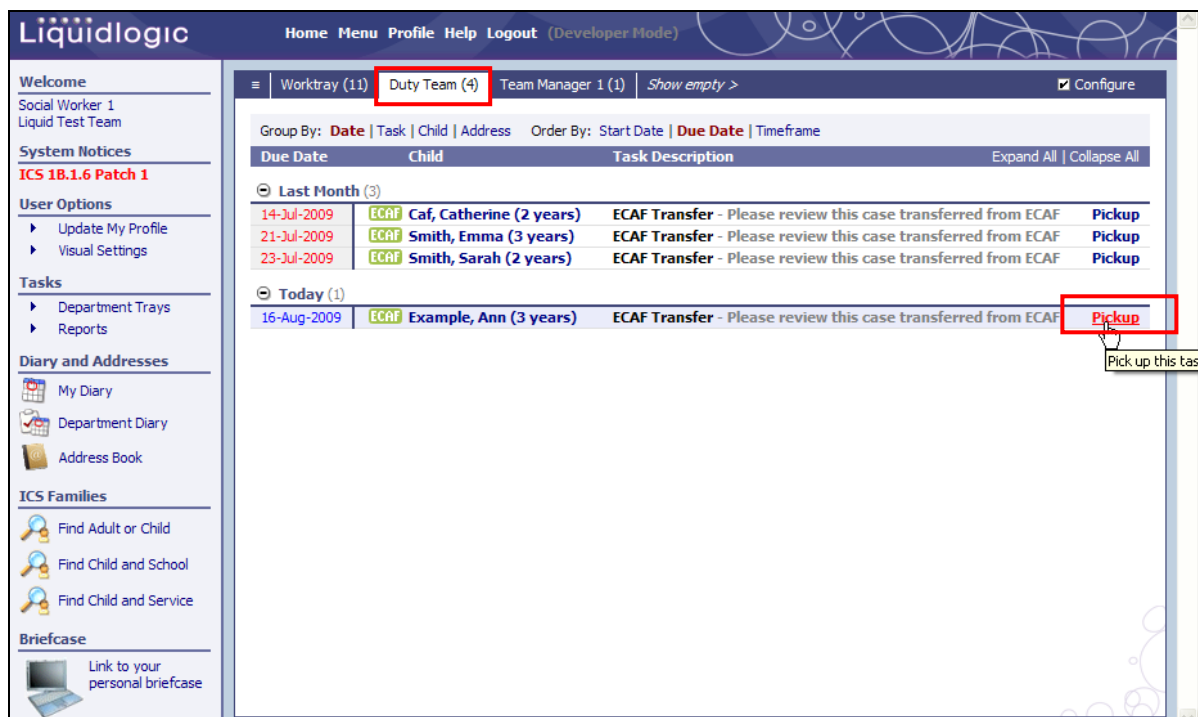
Transfer to ICS

	Date of Transfer	Comments
1	16-Aug-2009	CAF assessment has identified an escalated need for children's services support under s.17 to safeguard this child

Receiving ECAF Transfers in ICS

If a case is transferred from **PROTOCOL** eCAF to **PROTOCOL** ICS the case must be picked up and reviewed in the ICS system. Transferred cases will normally be sent to a group worktray within the ICS system to allow different members of this pre-defined group to acknowledge. The following example shows cases transferred from eCAF to ICS will alert the 'Duty Team' group within ICS. Please refer to your Liquidlogic Project Manager for details on where eCAF transfers will be assigned in your ICS system.

1. Click **Pickup** next to the **eCAF Transfer** task you wish to review and then click **OK**



The eCAF Transfer task will now be assigned to you and appear as a task in your work tray. The following summary of the eCAF transfer details will be displayed:

The case can not be activated within ICS without an ICS Person Record existing for the child/young person being transferred from eCAF. A search must be conducted within ICS for the child/young person before creating a new person record, this is to ensure an ICS Person record does not currently exist and a duplicate record is not created.

2. Click **Search/Create the Child's Record in ICS**

The screenshot shows the 'Example, Ann (3 years)' form. It is divided into several sections: 'Person Details - ECAF' (Forename: Ann, Surname: Example, DOB: 15-Aug-2006, Gender: Female, House No or Name: 1, Street: Selby Road, Town: Leeds, Postcode: LS25 1NB, Ethnicity, Immigration Status, Religion), 'Transfer Details' (Transfer Date: 16-Aug-2009, Transfer Comments: CAF assessment has identified an escalated need for children's services support under s.17 to safeguard this child, Are the parents aware of this contact? [checked], Do you wish to remain anonymous?), 'Professional requesting transfer' (Professional: Social Worker 1, Position, Agency: Liquid Test Team, Address: Brookfield House, Brookfield, Selby Road, Leeds, Telephone, Email: panos.christakos@liquidlogic.co.uk), and 'ICS Person' (ICS Person: Not identified in ICS). A red box highlights the 'Search / Create the Child's Record in ICS' link in the 'ICS Person' section.

The 'Find Person in ICS' query window will appear with search fields pre-populated with the main demographic details transferred from eCAF.

NOTE: The search criteria can be amended and wildcards can be used when searching within ICS.

3. Click **Search**

If child/young person has an ICS Person record the appropriate results will be displayed.

If the child/young person does not have an ICS Person record the following message will appear. At this point you can refine your search criteria and attempt to search again, alternatively if you are certain that the child does not have an ICS Person Record then continue to create a new ICS Record.

4. Click **Create**

- Record any further details including a Primary address in the new ICS record and click the **Create** button

NOTE: For further guidance on creating records in ICS refer to the **ICS Demographics** User Manual.

The eCAF record will now be associated with the newly created ICS Person Record.

TIP: If the ICS Person record shown in the screen above is incorrect, use the **Find another ICS Person** link to search again.

The case transferred from ECAF can now be activated in ICS by creating a contact. Please refer to the following section on **creating a new ICS contact**.

Creating a new ICS Contact

1. Click **Create new Contact**

Example, Ann (3 years)

Person Details - ECAF		Transfer Details	
Forename	Ann	Transfer Date	16-Aug-2009
Surname	Example	Transfer Comments	CAF assessment has identified an escalated need for children's services support under s.17 to safeguard this child
DOB	15-Aug-2006	Are the parents aware of this contact?	☒
Gender	Female	Do you wish to remain anonymous?	
House No or Name	1	Professional requesting transfer	
Street	Selby Road	Professional	Social Worker 1
Town	Leeds	Position	
Postcode	LS25 1NB	Agency	Liquid Test Team
Ethnicity		Address	Brookfield House Brookfield Selby Road Leeds
Immigration Status		Telephone	
Religion		Email	panos.christakos@liquidlogic.co.uk

ICS Person
ICS Person Child: Ann Example
Find another ICS Person

Actions
Create new Contact

2. The ICS Contact pathway will appear, Click **Start Contact**

Child: Ann Example 3 years
Case Pathway

Contact - New Contact Record Received

Contact Record Task Details No Other Children

The Contact Record has not been started.

Start Contact

New Contact Record

New Referral

Link to Current Referral

Enquiry of CP

Refer for Information and Advice

Referral to Other Agency

No Further Action

The details of the new contact can now be record in the **ICS Contact** form, below.

Save Changes Finalise Record Cancel Record Close

Information Contact Record

Contact Record

- Contact Record
- Signatures

Printable View

Contact Record

Notes on Child Details

- The above address is the child/young person's usual or home address. Where the parents' have shared care, the child/young person may have two addresses.
- Responsible Council with Social Services Responsibilities (CSSR) should be completed if contact is being made regarding a child/young person who is the responsibility of an authority other than your own. For example a child/young person who is the subject of a Child Protection Plan in another authority.

Contact Dates

Date of Contact 16-Aug-2009

Is/are parent(s) / carer(s) aware of contact? ☒ Yes ☐ No

Some of the data held within the ICS Contact form is automated. For example the **Date of Contact**, **The Contact and Reason for Contact** are populated from information derived from the transfer details from eCAF. Any data that the system has used to pre-populate the form is highlighted with an **M**, This signifies data brought in by data merge. This data can be manually amended.

- Use the sections on the left to navigate through the contact record and complete the necessary details
- In the Further Action section specify the **suggested outcome**, for example, **Progress to Referral** and the **Reasons** why and the **contact decision date**

Further Action

Suggested Outcomes

- ☒ Progress to Referral
- ☐ Link to Existing Referral
- ☐ Non-Agency Adoption—Ensure there is an Allocated Case Worker
- ☐ Enquiry of CP
- ☐ Provision of Information/Advice
- ☐ Referral to Other Agency
- ☐ No Further Action
- ☐ Missing Child
- ☐ Private Fostering Arrangement Assessment
- ☐ OLA CP notification

Reasons for these Suggested Outcomes

Reasons for these Suggested Outcomes

Contact Decision Date today

5. Use the **Save Changes** button to continually save any entered details and click **Finalise Record** once complete and then **OK** to confirm

NOTE: Please refer to the **ICS Child In Need – Contacts and Referrals** User Manual for details.

The ICS Contact will now require authorisation and a referral will then need to be recorded. For further guidance on how to progress a case in ICS please refer to the **ICS Child In Need – Contacts and Referrals** User Manual.

TIP: The CAF Assessment form will also automatically migrate to the child's ICS record and can be found on their forms tab:

ICS Notifications sent to eCAF

When a case is transferred from eCAF to ICS the eCAF Episode Coordinator will receive notifications at certain stages within the ICS process.

For example, a notification is generated and sent to the work tray of the ECAF Episode Coordinator when a new Contact Record is created in ICS.

No Due Date	Ann Example, 8 3 years	Transfer to ICS - A new contact was created in the ICS system
-------------	------------------------	---

Please note: A client's specific configuration will dictate who will receive the notifications

A notification is generated and sent to the work tray of the eCAF Episode Coordinator when the case is progressed to a Referral and Information record in ICS.

No Due Date	Ann Example, 8 3 years	Transfer to ICS - The case you transferred to ICS has progressed to referral in the ICS system
-------------	------------------------	--

TIP: To remove notifications simply select the notification task from your work tray and then click **Remove task from worktray**

Record of Transfer to ICS, 16-Aug-2009

Transfer Details

Date of Transfer	16-Aug-2009
Are the parents aware of this contact?	Yes
Do you wish to remain anonymous?	No
Comments	CAF assessment has identified an escalated need for children's services support under s.17 to safeguard this child

Response from ICS

ICS Action	The case you transferred to ICS has progressed to referral in the ICS system
------------	--

Actions

- ▶ View Episode Details
- ▶ Remove task from the worktray

Initiate Case Transfer Process

If the role of the eCAF Episode Coordinator is to be transferred to another professional in a different team the case transfer process can be initiated from the **Involvements** Tab on the Current Episode Details.

NOTE: The facility to 'Initiate the Case Transfer Process' within **PROTOCOL** eCAF is only available to users with the necessary access rights. Please refer to your eCAF Systems Administrator for further guidance.

1. Navigate to the Current Episode and select the **Involvements** Tab
2. Click **Initiate Case Transfer Process**

Liquidlogic Home Menu Profile Help Logout

Rosie Davis, Age 3 years
Episode 01-Feb-2007

Episode Details | **Activities** | **Involvements** | Consent | Access Requests

	Role	Worker	Start Date	End Date	Access Level
1	Other Role	Robert Henderson - Liquid Test Team	20-Feb-2008 00:28	20-Feb-2008 00:36	Full Access
2	Episode Coordinator	Claire Wallace - ECAF Team	09-Feb-2007 20:58		Full Access

► Add Involvement

Case Transfers

List is empty

► Initiate Case Transfer Process

The **eCAF Case Transfer** form will appear.

Liquidlogic Home Menu Profile Help Logout

Rosie Davis, Age 3 years
ECF Case Transfer, 20-Feb-2008 01:14

Save Changes | Send to Receiving Team | Close

Information | **ECF Case Transfer**

ECF Case Transfer

- 1. Transfer Details
- 2. Record new coordinator and ...

Stage: Transfer Details

Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.

Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks..

► Printable View

ECF Case Transfer

This process has been designed to facilitate the smooth and safe transfer of case-holding responsibilities between teams within the ECAF Team. In order to transfer a case all steps must be completed in the correct sequence shown.

3. Select the **Transfer Details** section and complete the necessary fields

TIP: There are mandatory fields within the **Point of Transfer** domain which must be completed

4. Enter **Proposed Date for Transfer of Case**
5. Select **Click here to select a user....** to specify the **Receiving Team** or Deputy Team Manager from the Address Book

Liqidlogic Home Menu Profile Help Logout

Rosie Davis, Age 3 years
ECAF Case Transfer, 20-Feb-2008 01:14

Save Changes Send to Receiving Team Close

Information ECAF Case Transfer

ECAF Case Transfer

- 1. Transfer Details
 - Electronic Record
 - Case Files
 - Point of Transfer**
- 2. Record new coordinator and ...

Stage: Transfer Details

Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.

Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks..

Printable View

Point of Transfer

The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.

Proposed Date For Transfer Of Case

Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.

Receiving Team or Deputy Team Manager [Click here to select a user...](#)

Access Check

NOTE: For further guidance on using the Address Book refer to the **eCAF General** User Manual.

If the user which is selected as the Receiving Team/Deputy Team Manager has access to the Case Transfer process and the current episode the access check will be positive, below.

Liqidlogic Home Menu Profile Help Logout

Rosie Davis, Age 3 years
ECAF Case Transfer, 20-Feb-2008 01:14

Save Changes Send to Receiving Team Close

Information ECAF Case Transfer

ECAF Case Transfer

- 1. Transfer Details
 - Electronic Record
 - Case Files
 - Point of Transfer**
- 2. Record new coordinator and ...

Stage: Transfer Details

Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.

Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks..

Printable View

Point of Transfer

The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.

Proposed Date For Transfer Of Case 20-02-2008

Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.

Receiving Team or Deputy Team Manager **Claire Wallace**

Access Check **Claire Wallace has access to the process**

If the user which is selected as the Receiving Team/Deputy Team Manager does not have access to the Case Transfer process and the current episode the particular user can be granted access:

Liqidlogic Home Menu Profile Help Logout

Rosie Davis, Age 3 years
ECAF Case Transfer, 20-Feb-2008 01:14

Save Changes Send to Receiving Team Close

Information ECAF Case Transfer

ECAF Case Transfer

- 1. Transfer Details
 - Electronic Record
 - Case Files
 - Point of Transfer**
 - 2. Record new coordinator and ...

Stage: Transfer Details

Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.

Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks...

Printable View

Point of Transfer

The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.

Proposed Date For Transfer Of Case 20-02-2008

Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.

Receiving Team or Deputy Team Manager Andrew Griffin

Access Check Andrew Griffin does not have access to this process

Grant access

6. Click **Grant Access**

The current consent statement will be shown, if the selected worker is granted access under the current consent statement continue to Step 9.

If the selected worker is not recorded as having access under the current consent statement then a **new consent statement** will need to be created to include the selected worker. For further guidance on consent statements refer to the **Obtain Consent** section in this manual.

7. Choose **Role** and **Access Level** from drop down lists provided
8. Click **Create**

Liqidlogic Home Menu Profile Help Logout

Rosie Davis, Age 3 years
Access to Episode

Create Cancel - Add Access (make sure consent statement includes worker)

New Access to Episode

Role and Effective Dates

Role	Episode Coordinator
Access Level	Full Access
Start Date	20-Feb-2008 01:34
End Date	

Worker Details

Worker Andrew Griffin

Current Consent Statement

Restrictions Access is ONLY available to:

- Claire Wallace - ECAF Team
- Andrew Griffin - ECAF Team

New Consent Statement

The Receiving Team/Deputy Team Manager selected will now have sufficient access to receive the case transfer task.

9. Click **Save Changes** and then **Send to Receiving Team**

Liqidlogic Home Menu Profile Help Logout

Rosie Davis, Age 3 years
ECAC Case Transfer, 20-Feb-2008 01:14

Save Changes Send to Receiving Team Close

Information ECAC Case Transfer

ECAC Case Transfer

- 1. Transfer Details
 - Electronic Record
 - Case Files
 - Point of Transfer**
- 2. Record new coordinator and ...

Stage: Transfer Details

Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.

Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks..

Printable View

Point of Transfer

The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.

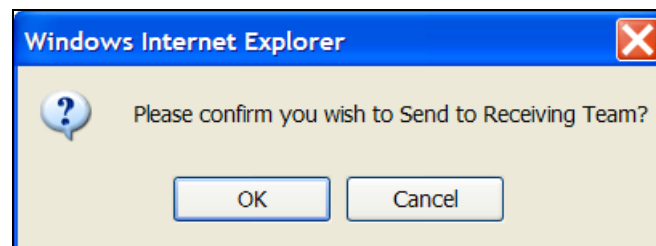
Proposed Date For Transfer Of Case 20-02-2008

Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.

Receiving Team or Deputy Team Manager Andrew Griffin

Access Check Andrew Griffin has access to the process

10. Click **OK** to the following prompt



The case transfer task will now be sent to the Receiving Team/Deputy Team Manager to action.

Complete Case Transfer Process

1. The Receiving Team/Deputy Team Manager must select the task **ECAC Case Transfer** from the work tray

Liqidlogic Home Menu Profile Help Logout

Welcome Andrew Griffin ECAF Team

System Notices
ECAC 1.0

User Options

- Update My Profile
- Visual Settings

Diary and Addresses

- My Diary
- Department Diary
- Address Book

Messages

- Your Messages (0)

ECAC Query

- Find Adult or Child

Worktray Manager Tray ECAF Team Subscriptions

Group By: Date | Task | Child | Address Order By: Start Date | Due Date | Timeframe

Due Date	Child	Task Description
No Due Date (1)		
Tomorrow (1)		
21-Feb-2008	Rosie Davis, Age 3 years	ECAC Case Transfer - Please complete the Record new coordinator

2. Review the information contained within the Transfer Details section of the ECAF Case Transfer form
3. Select **Click here to select a user...** in order to record the new **Coordinator**

2. Record new coordinator and team

This form must be completed within 24 hours of the agreed point of transfer. If the transfer does not go ahead as planned you must return to section 1 and record the revised date of transfer.

By completing this form you are confirming that case transfer has been completed successfully. For a checklist of the actions that should have taken place as part of this transfer please refer back to section 2 of this form.

Record new location of paper files

Record new Coordinator

Reassign Professionals

Professional Role	Assigned To	Re-assign To	Actions
☐ No Role	Team Manager 1	Click here to select a user...	
Request for Access to Episode - Rejected (Started: 12-Feb-2008, Due: 12-Feb-2008)			
☐ Coordinator	Claire Wallace	Social Worker2 ✖	User: Social Worker2 does not have access to this process Grant access
CAF Assessment - Please complete CAF Assessment for Child (Started: 16-Feb-2008, Due: No due date)			
CAF Assessment (Started: 16-Feb-2008, Due: No due date)			
☐ No Role	Andrew Griffin	Click here to select a user...	
No tasks assigned to this professional.			

TIP: If the chosen **new coordinator** does not have access to the current episode, access will need to be granted by clicking **Grant Access**.

4. Once the chosen **new coordinator** does have access to the current episode, then click **Complete Case Transfer**

All tasks assigned to the previous Episode Coordinator prior to the completion of the case transfer process will automatically be assigned to the new Episode Coordinator. The involvements tab on the current episode will also reflect the Episode Coordinator having been changed.

Requesting Access to ECAF Records

If the Current Consent Statement linked to the active eCAF Episode does not allow a user to have access then a user can request access to the episode by carrying out the following steps.

In this example; the current consent statement does not allow 'Social Worker 1' access to the child (Emma Smith)'s current eCAF Episode. The user 'Social Worker 1' would therefore need to request access to the eCAF Episode.

The screenshot shows the 'Episode Details' tab selected. The 'Consent' section is highlighted with a red box. The 'Restrictions' field displays 'Access is ONLY available to: Helen Shaw - Liquid Test Team'. Below this, there are links for 'Update current Consent Statement' and 'New Consent Statement'. The 'Cancel Episode' section at the bottom states: 'The episode cannot be cancelled from this screen once the consent has been inserted'.

Episode Details	
Episode Coordinator	Helen Shaw - Liquid Test Team
Episode Date	21-Jul-2009 10:41
End Date	
Status	
Reason	Family and Environment - Social & Community Elements
Additional Notes	details go here....
▶ Episode Pathway	
▶ Update Episode	
Episode Shielding	
Shielded	No
Reason for Shielding	
Consent	
Restrictions	Access is ONLY available to: Helen Shaw - Liquid Test Team
▶ Update current Consent Statement	
▶ New Consent Statement	
Cancel Episode	
The episode cannot be cancelled from this screen once the consent has been inserted	

If another user tries to select an episode which they do not have access to, as shown in the example below where Social Worker 1 is trying to access the episode for Emma Smith...

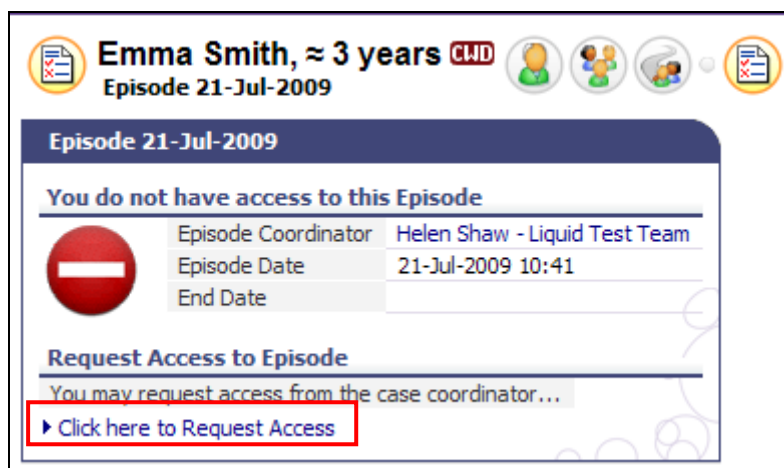
The screenshot shows the 'Basic Demographics' tab selected. The 'Episodes' section contains a table with one episode listed. A mouse cursor is hovering over the 'End Date' column of the first episode.

Episodes			
	Episode Date	End Date	Episode Coordinator
1	21-Jul-2009 10:41		Helen Shaw - Liquid Test Team

Documents
There are no documents.

...The user will be presented with the following warning to illustrate that they do not have access to the selected episode:

5. Select the link **Click here to Request Access**



Emma Smith, ≈ 3 years CWD
Episode 21-Jul-2009

Episode 21-Jul-2009

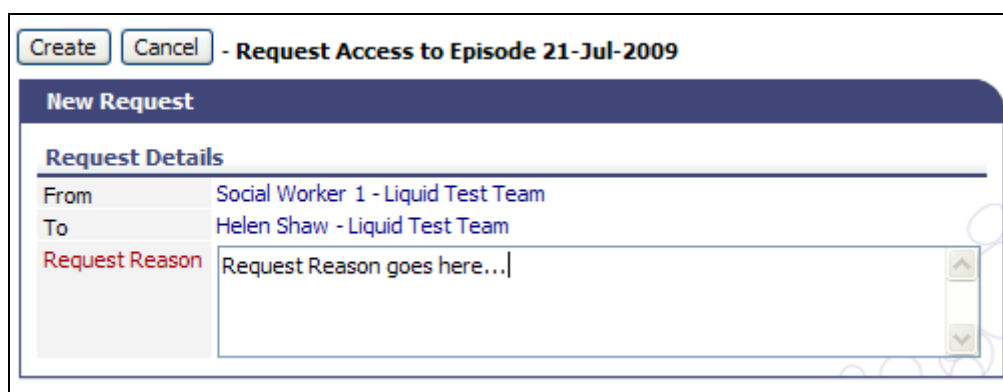
You do not have access to this Episode

 Episode Coordinator: Helen Shaw - Liquid Test Team
Episode Date: 21-Jul-2009 10:41
End Date:

Request Access to Episode
You may request access from the case coordinator...

[Click here to Request Access](#)

6. Enter the **Request Reason** and then click **Create**



Create Cancel - Request Access to Episode 21-Jul-2009

New Request

Request Details

From: Social Worker 1 - Liquid Test Team
To: Helen Shaw - Liquid Test Team
Request Reason: Request Reason goes here... |

The access request will be sent to the episode coordinator to review, in the meantime the request has a status set to **Pending**.



Episode 21-Jul-2009

You do not have access to this Episode

 Episode Coordinator: Helen Shaw - Liquid Test Team
Episode Date: 21-Jul-2009 10:41
End Date:

Request Access to Episode
You may request access from the case coordinator...

	Date Of Request	To	Status
1	16-Aug-2009 13:44	Helen Shaw - Liquid Test Team	Pending

[Click here to Request Access](#)

Email Notifications

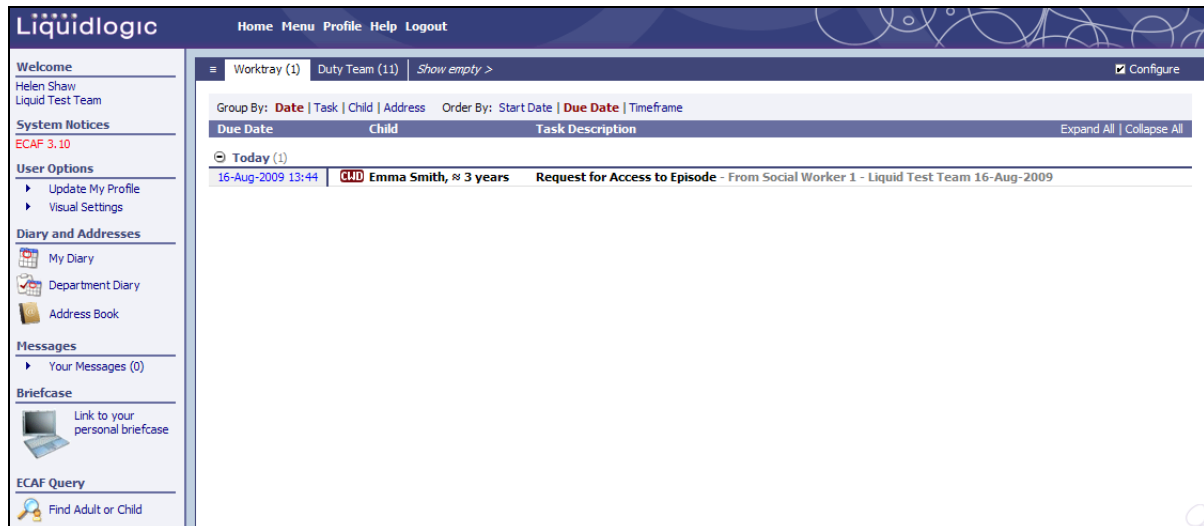
If the episode coordinator has a valid email address recorded on their professional profile within **PROTOCOL** eCAF then the system can send a notification of the access request via email to the episode coordinator. Please note that Access Requests can not be Approved/Rejected from your email, access requests can only be dealt with in **PROTOCOL** eCAF.

For further guidance on adding an email to **Your Profile** and configuring email notifications please refer to the **eCAF General User Manual** and speak to your Liquidlogic Project Manager.

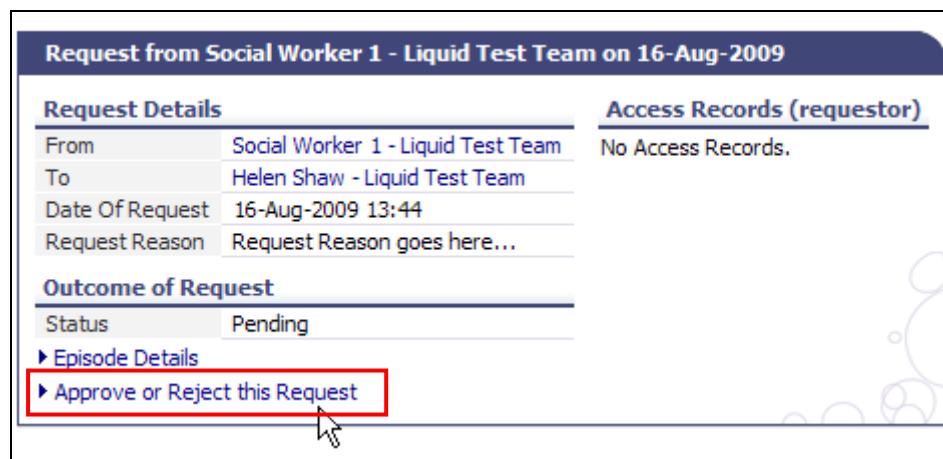
Approving Requests

The episode coordinator will receive a task in their work tray for the access request.

1. Select the task **Request for Access to Episode** from the work tray



2. The episode coordinator would review the access request and then record the response by clicking the **Approve or Reject this Request** link



3. Select the **Accept Response** option from the Status drop down list
4. Enter a **Response** and choose an **Access Role** and **Access Level**
5. Record a **New Consent Statement** to include the user requesting the access
6. Click **Update**

Update Cancel - Update: Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Update Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request Details		Access Records (current user)				
From	Social Worker 1 - Liquid Test Team	Role	Worker	Start Date	End Date	Access Level
To	Helen Shaw - Liquid Test Team	1	Episode Coordinator	Helen Shaw - Liquid Test Team	21-Jul-2009 10:41	Full Access
Date Of Request	16-Aug-2009 13:44					
Request Reason	Request Reason goes here...					
Outcome of Request		Access Records (requestor)				
Status	Accept Request	No Access Records.				
Response	My response is....	Current Consent Statement				
Access Role		Restrictions				
Access Level		Access is ONLY available to:				
		Helen Shaw - Liquid Test Team				
		New Consent Statement				

For further guidance on creating new consent statements refer to the **Creating New Consent Statement** section within this manual.

The request has been successfully accepted and the user will receive a notification in their work tray to reflect they have been granted access to the eCAF Episode.

7. Select the task **Request for Access to Episode – Accepted**

16-Aug-2009 13:53 **CMD** Emma Smith, ≈ 3 years **Request for Access to Episode - Accepted - Please open to view.**

8. Review the details and select the **Click here to remove the notification from your work tray** link

Emma Smith, ≈ 3 years CMD
Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request Details		Access Records (requestor)				
From	Social Worker 1 - Liquid Test Team	Role	Worker	Start Date	End Date	Access Level
To	Helen Shaw - Liquid Test Team	1	Other Role	Social Worker 1 - Liquid Test Team	16-Aug-2009 13:53	Update
Date Of Request	16-Aug-2009 13:44	2	Other Role	Social Worker 1 - Liquid Test Team	16-Aug-2009	Read-Only
Request Reason	Request Reason goes here...					
Outcome of Request						
Status	Accepted					
Date	16-Aug-2009 13:53					
Response	My response is....					
Episode Details						
Click here to remove the notification from your worktray						

Rejecting Requests

The episode coordinator may decide to reject a request from another eCAF user to access a child's CAF episode.

1. Select the task **Request for Access to Episode** from your work tray

16-Aug-2009 14:04	Tilly Test, ≈ 5 years	Request for Access to Episode - From Social Worker 1 - Liquid Test Team	16-Aug-2009
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2. The episode coordinator would review the access request and then record the response by clicking the **Approve or Reject this Request** link

Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request Details	Access Records (requestor)
From: Social Worker 1 - Liquid Test Team	No Access Records.
To: Helen Shaw - Liquid Test Team	
Date Of Request: 16-Aug-2009 14:04	
Request Reason: Request Reason	
Outcome of Request	
Status: Pending	
▶ Episode Details	
▶ <u>Approve or Reject this Request</u>	

3. Select the **Reject Response** option from the **Status** drop down list
4. Enter **Response** and click **Update**

Update Cancel - Update: Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Update Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request Details	Access Records (current user)										
From: Social Worker 1 - Liquid Test Team	<table><tr><th>Role</th><th>Worker</th><th>Start Date</th><th>End Date</th><th>Access Level</th></tr><tr><td>1</td><td>Episode Coordinator</td><td>Helen Shaw - Liquid Test Team</td><td>16-Jul-2009 15:25</td><td>Full Access</td></tr></table>	Role	Worker	Start Date	End Date	Access Level	1	Episode Coordinator	Helen Shaw - Liquid Test Team	16-Jul-2009 15:25	Full Access
Role	Worker	Start Date	End Date	Access Level							
1	Episode Coordinator	Helen Shaw - Liquid Test Team	16-Jul-2009 15:25	Full Access							
To: Helen Shaw - Liquid Test Team											
Date Of Request: 16-Aug-2009 14:04											
Request Reason: Request Reason											
Access Records (requestor)											
No Access Records.											
Current Consent Statement											
Restrictions: Access is ONLY available to: Helen Shaw - Liquid Test Team											
▶ New Consent Statement											
Outcome of Request											
Status: Reject Request											
Response: Rejection reason....											
Access Role:											
Access Level:											

The outcome of the request will be displayed:

Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request Details	Access Records (requestor)
From: Social Worker 1 - Liquid Test Team	No Access Records.
To: Helen Shaw - Liquid Test Team	
Date Of Request: 16-Aug-2009 14:04	
Request Reason: Request Reason	
Outcome of Request	
Status: Rejected	
Date: 16-Aug-2009 14:08	
Response: Rejection reason...	
▶ Episode Details	

The user will receive a notification in their work tray to reflect they have not been granted access to the eCAF Episode.

5. Select the task **'Request for Access to Episode – Rejected'**

16-Aug-2009 14:08	Tilly Test, ≈ 5 years	Request for Access to Episode - Rejected - Please open to view.
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6. Choose the **Click here to remove the notification from your work tray** link

Tilly Test, ≈ 5 years
Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request from Social Worker 1 - Liquid Test Team on 16-Aug-2009

Request Details		Access Records (requestor)
From	Social Worker 1 - Liquid Test Team	No Access Records.
To	Helen Shaw - Liquid Test Team	
Date Of Request	16-Aug-2009 14:04	
Request Reason	Request Reason	

Outcome of Request

Status	Rejected
Date	16-Aug-2009 14:08
Response	Rejection reason...

▶ Episode Details

▶ [Click here to remove the notification from your worktray](#)

Episode Details Tabs

The eCAF Episode Details tabs provide a summary of the various details entered within the eCAF Episode.

Episode Details Tab

The Episode Details Tab displays the Episode Coordinator and who has consent to access the episode.

The screenshot shows the 'Episode Details' tab selected in the eCAF system. The header includes the 'Liquidlogic' logo and navigation links: Home, Menu, Profile, Help, Logout. Below the header, the user's name 'Emma Smith, ≈ 3 years' and 'Episode 21-Jul-2009' are displayed, along with a 'CWD' status icon and several user profile icons. The main content area is divided into several sections: 'Episode Details' (with fields for Episode Coordinator, Episode Date, End Date, Status, Reason, and Additional Notes), 'Episode Pathway' (with links for Episode Pathway and Update Episode), 'Episode Shielding' (with fields for Shielded and Reason for Shielding), 'Consent' (with a Restrictions section showing access for Helen Shaw and Social Worker 1), and 'Cancel Episode' (with a message stating the episode cannot be cancelled once consent is inserted).

Episode Details	
Episode Coordinator	Helen Shaw - Liquid Test Team
Episode Date	21-Jul-2009 10:41
End Date	
Status	
Reason	Family and Environment - Social & Community Elements
Additional Notes	details go here....
▶ Episode Pathway	
▶ Update Episode	

Episode Shielding	
Shielded	No
Reason for Shielding	

Consent	
Restrictions	Access is ONLY available to: - Helen Shaw - Liquid Test Team - Social Worker 1 - Liquid Test Team
▶ Update current Consent Statement	
▶ New Consent Statement	

Cancel Episode	
The episode cannot be cancelled from this screen once the consent has been inserted	

NOTE: Please refer to the **eCAF – Episode Details** document for more information.

Activities Tab

The Activities Tab lists the CAF Assessments, stand-alone forms and meetings as well as whether an episode has been transferred to ICS.

The screenshot shows the 'Activities' tab selected in the 'Episode Details' section. It displays three tables: 'Assessments and Forms', 'Standalone Assessments', and 'Family Support Meetings'. The 'Assessments and Forms' table shows two completed CAF assessments on 21-Jul-2009. The 'Standalone Assessments' section states that no standalone assessments have been completed. The 'Family Support Meetings' table shows one planned meeting on 21-Jul-2009 at 11:00 in Meeting Rm 1. Below these is a 'Transfer to ICS' table with one entry for 21-Jul-2009 with the comment 'details go here....'.

Assessment Date	Assessment Type	Assessor	Status
1 21-Jul-2009 10:53	CAF Assessment	Helen Shaw	Completed
2 21-Jul-2009 10:53	CAF Assessment	Helen Shaw	Completed

Standalone Assessments
No Standalone Assessments have been completed

Planned Meeting Date	Actual Meeting Date	Location
1 21-Jul-2009 11:00	21-Jul-2009	Meeting Rm 1

Transfer to ICS

Date of Transfer	Comments
1 21-Jul-2009	details go here....

NOTE: Please refer to the **eCAF – Episode Details** document for more information.

Involvements Tab

The Involvements tab lists both current and previous involvements as well as Case Transfers including the ability to initiate a case transfer.

The screenshot shows the 'Involvements' tab selected. It displays a table of roles and workers, a link to 'Add Involvement', a 'Case Transfers' section with an empty list, and a link to 'Initiate Case Transfer Process'.

Role	Worker	Start Date	End Date	Access Level
1 Other Role	Social Worker 1 - Liquid Test Team	16-Aug-2009 13:53		Update
2 Other Role	Social Worker 1 - Liquid Test Team	16-Aug-2009		Read-Only
3 Episode Coordinator	Helen Shaw - Liquid Test Team	21-Jul-2009 10:41		Full Access

► Add Involvement

Case Transfers
List is empty

► Initiate Case Transfer Process

NOTE: Please refer to the **eCAF – Episode Details** document for more information.

Case Notes Tab

The Case Notes tab lists all saved and finalised case notes. This tab also provides the ability to create a new case note, update an un-finalised case note, filter the list of case notes based on the entered free text criteria or produce case note reports.

The screenshot shows the Liqidlogic interface for Emma Smith, Episode 21-Jul-2009. The 'Case Notes' tab is selected. Below the navigation bar, there is a 'Free Text Filter' input field with 'Go' and 'Reset' buttons. Below this, there are links for 'Case Note Report' and 'Add Case Note'. A table lists three case notes:

	Finalised?	Contact Date	Contact Type	Contact Regarding	Reason for Contact	Created By
1	☒ Yes	16-Aug-2009	General Note	Emma Smith	Information goes here...	Helen Shaw
2	☐ No	15-Aug-2009	Telephone Call (In)	Emma Smith	Telephone call from Emma's Mother	Helen Shaw
3	☒ Yes	21-Jul-2009	Home Visit	Emma Smith	details go here....	Helen Shaw

Below the table is a link to 'Add Case Note'.

NOTE: Please refer to the **eCAF – Episode Details** document for more information.

Services Tab

The Services tab lists service requests and service provisions, both pending and active. New requests for service and service provisions can also be created here.

The screenshot shows the Liqidlogic interface for Emma Smith, Episode 21-Jul-2009. The 'Services' tab is selected. Below the navigation bar, there is a section for 'Pending Service Requests' with a table:

	Requested by	Addressed to	Request Date	Service Type
1	Helen Shaw - Liquid Test Team	Social Worker 1	05-Aug-2009 14:27	General Type

Below this table are links to 'Create new Service Request' and 'Click here to view all service requests for this episode...'. Below that is a section for 'Service Provisions (Active and Pending Allocation of Resource)' with a table:

	Start Date	Projected End Date	Service Type	Delivered by	Status
1	16-Aug-2009		Educational Service		Pending Resource Allocation
2	15-Aug-2009		General Type	CAMHS*	Active

Below this table are links to 'Create new Service Provision (without request)' and 'Click here to view all service provisions for this episode...'.

NOTE: Please refer to the **eCAF – Episode Details** document for more information.

Consent Tab

The Consent tab lists both current and previous consent statements for this episode. These can be selected to drill down to further details.

The screenshot shows the Liqidlogic web application interface. At the top is a navigation bar with the Liqidlogic logo and links for Home, Menu, Profile, Help, and Logout. Below this is a header section for 'Emma Smith, ≈ 3 years' with a 'CWD' status and 'Episode 21-Jul-2009'. A series of icons represents different aspects of the episode. Below the header is a tabbed interface with options: Episode Details, Activities, Involvements, Case Notes, Services, Consent (selected), and Access Requests. The 'Consent' tab displays a table with the following data:

	Consent Date	Ended At	Entered By	Comments
1	16-Aug-2009			
2	21-Jul-2009	16-Aug-2009		details go here....

NOTE: Please refer to the **eCAF – Episode Details** document for more information.

Access Requests Tab

The Access Requests tab lists all users who have requested access to this episode and the status of the request.

The screenshot shows the Liqidlogic web application interface, similar to the previous one, but with the 'Access Requests' tab selected. The header and navigation bar are identical. The 'Access Requests' tab displays a table with the following data:

	Date Of Request	From	To	Status
1	16-Aug-2009 13:44	Social Worker 1 - Liquid Test Team	Helen Shaw - Liquid Test Team	Accepted

NOTE: Please refer to the **eCAF – Episode Details** document for more information.