How to use HolistiX – a reference guide

<div style="border:2px solid red;color:red">

Hold Ctrl and click on any of the following sections to be taken there directly, or simply scroll through the complete document.

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If there are any processes that you think are not explained in this list, please email earlyhelpsecure-mailbox@devon.gcsx.gov.uk and let us know what you like to be added.

1. INTRODUCTION

HolistiX is a secure online system that has been created to make the Devon Assessment Framework (DAF) process easier, simpler and more efficient in Devon. As well as being online, HolistiX has another advantage over paper forms because it means that families can be assessed as a whole. While children and young people remain at the centre of the process this family approach ensures that everyone's needs are taken into consideration in order to make a lasting difference.

Firstly, you will need to read and complete the 'HolistiX User Agreement Form' which must be approved by your Line Manager and sent from their work email address to the Early Help Coordination Centre, where they will provide you with a username and password for the HolistiX system.
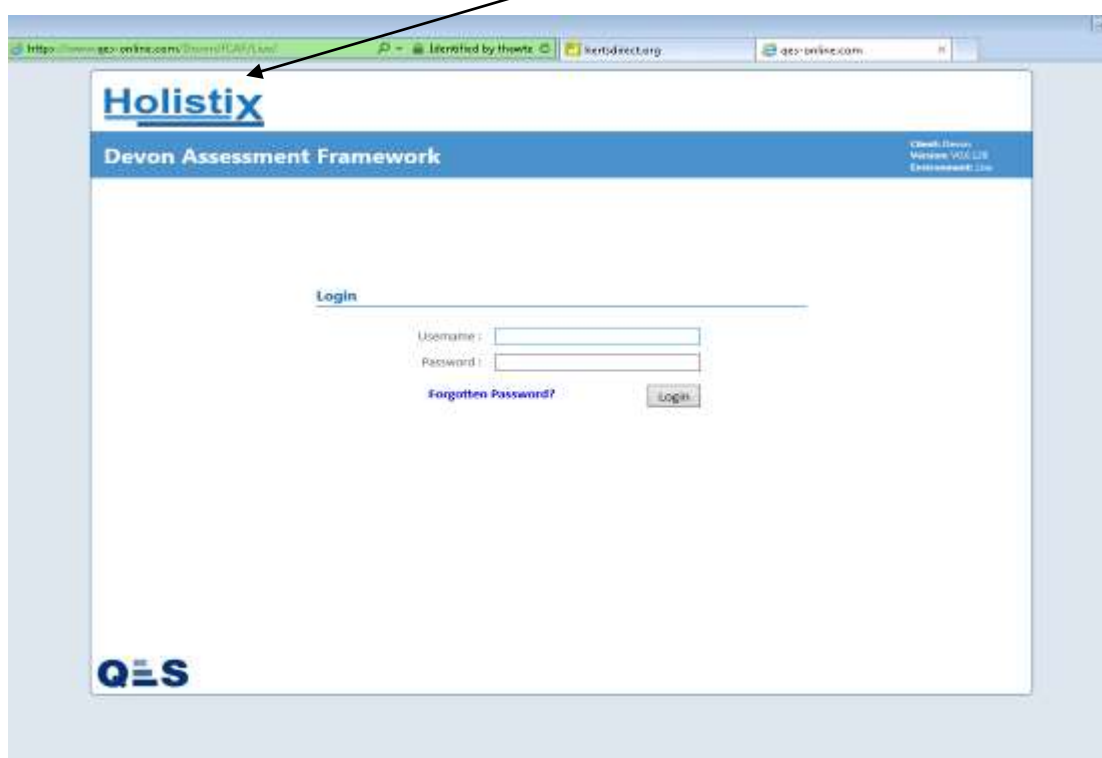
The Early Help Co-Ordination Centre can be contacted on 0345 1551071 or emailed at earlyhelpsecure-mailbox@devon.gcsx.gov.uk

**Before you start - An Important Note about Tabbed Browsing**
Many internet browsers now have a feature that allows multiple web pages to be opened simultaneously in tabs. It is recommended that you use HolistiX through one tab in one internet browser window. Opening multiple tabs causes problems with the system which may result in you losing information you have entered when completing an assessment.

1.1. Login

https://www.qes-online.com/Devon/fCAF/Live/
Please add to your favourites in your internet browser.

Enter your username and password, that will have been provided from the Early Help Co-ordination Centre and select 'log in'. HolistiX requires an authentication code so you will now see the screen below:
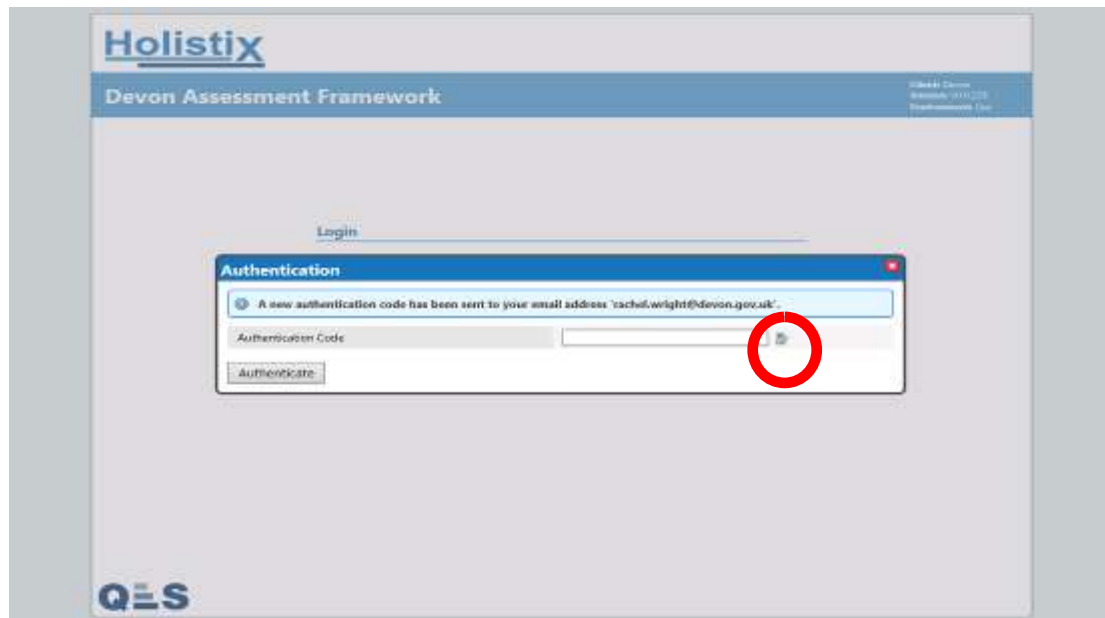
The system will send an authentication code to the email address you have provided in the HolistiX User Agreement Form. It may take a few minutes for your authentication code to be delivered.

Copy and paste the code into the code box and click 'Authenticate'. You have the option on how you receive the code by selecting the email or mobile icon beside the code box. Please **do not** enter your username and password again while waiting for the code, it will trigger multiple codes to be sent.

If you forget your password you can select 'Forgotten Password' and a temporary password will be sent to your email address. If you have any problems please contact the Early Help Co-ordination Centre on 0345 1551071 or by email: earlyhelpsecure-mailbox@devon.gcsx.gov.uk.

When first logging into HolistiX you will need to read, understand and accept the 'Acceptable Use Policy'. You will then be required to change your password:
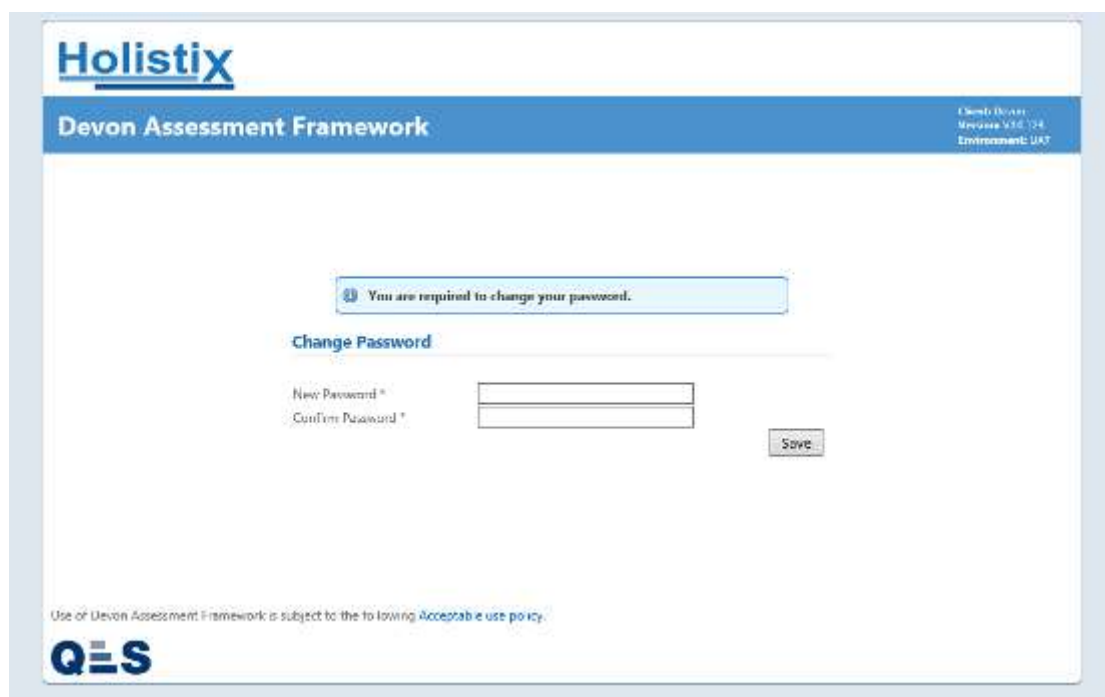
1.2. My Messages

The first page you will come to is the 'My Messages' screen.
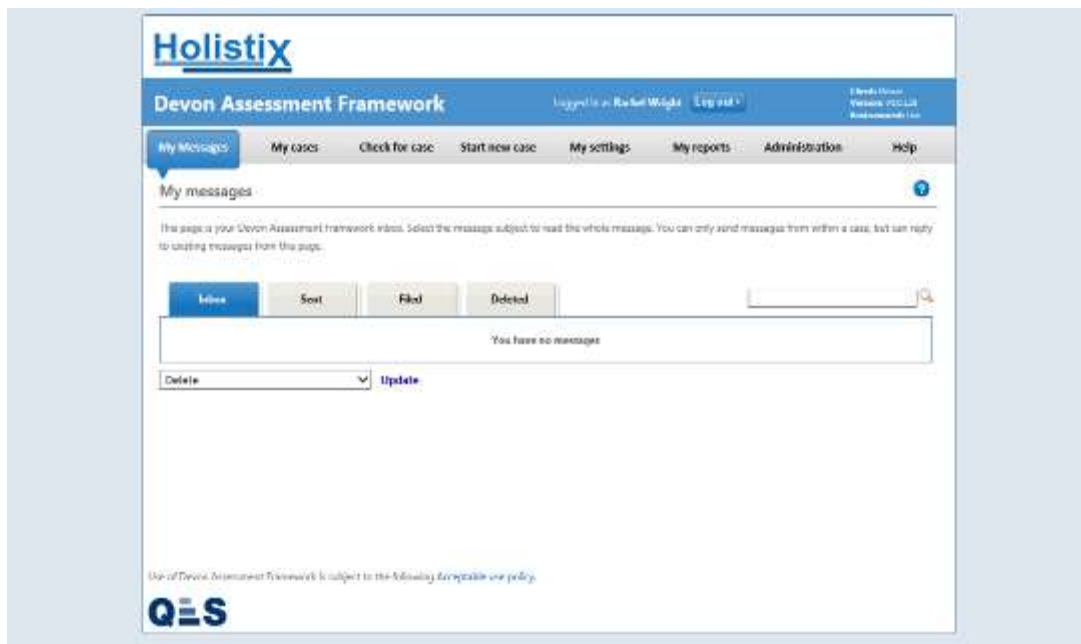
You can check your messages in relation to any cases you are co-ordinating or are involved with through HolistiX. The system will only message through cases logged on there, you will not be able to send messages outside of the HolistiX system other than case alerts which occur when activity is taking place on a case, i.e. a practitioner is added to a TAC. No other information will be sent on the alerts.

1.3. Change password and/or personal details

You are able to change your password at any time through the 'My Settings' tab and then 'Change Password':
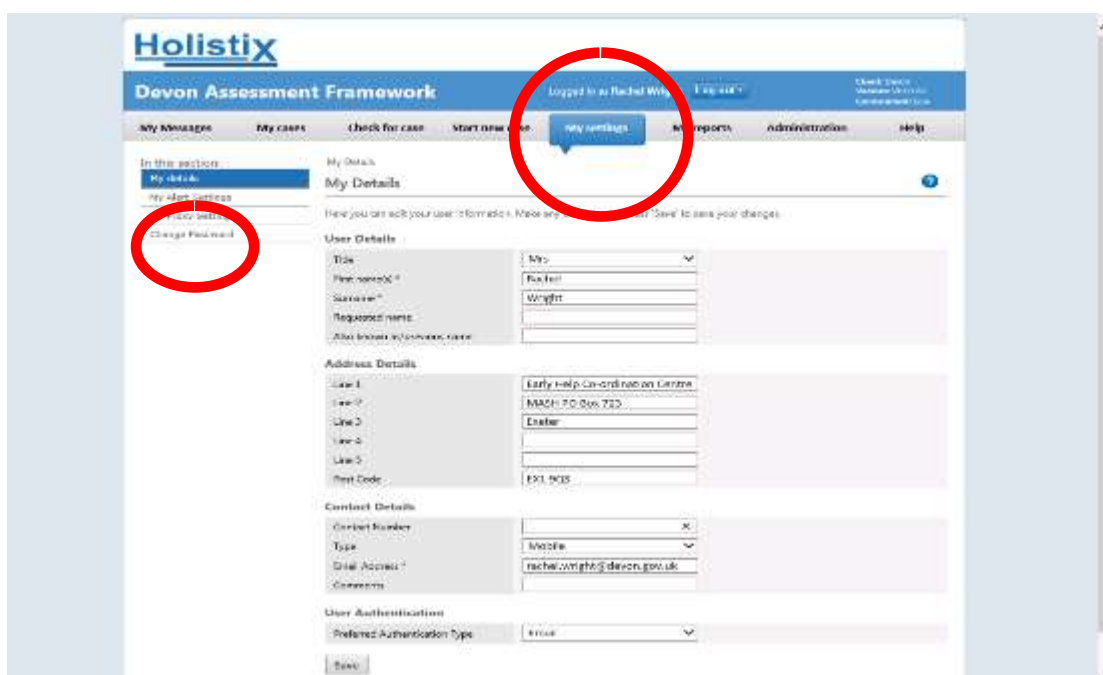
On the 'My Details' tab you are able to amend or update various details such as work address or telephone number, if necessary, and you can select how you would like to receive the authentication code i.e.by email or text message via your mobile phone.

1.4. Check for Case
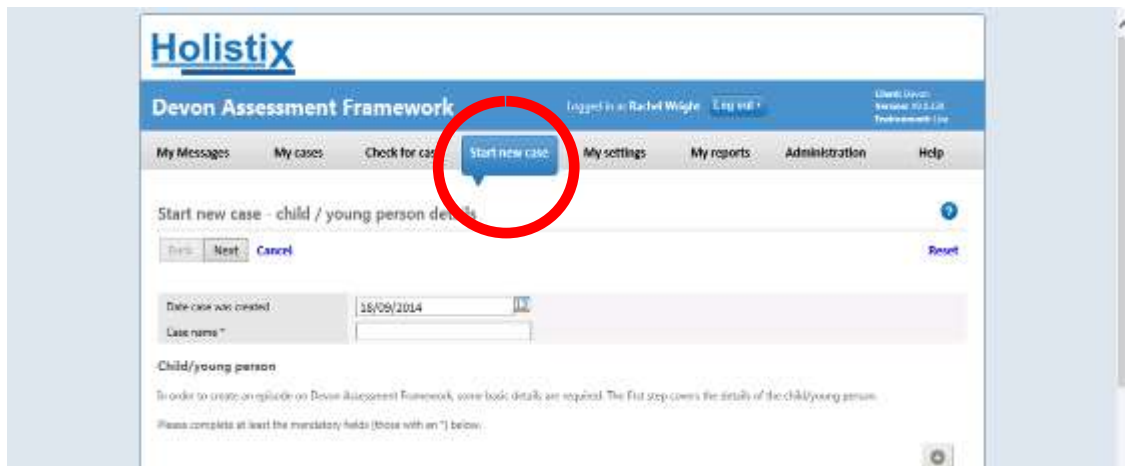
Before starting a new case you should always check that the case is not already in progress. To do this you need to select the 'Check for Case' tab as shown:

Here you can enter the surname and first name of a child or family member and, perhaps, a date of birth to filter the cases easier. Click 'Search' for HolistiX to find any matches to the details you have provided. HolistiX will provide a match, if the case is already in progress, and you can select 'Go to Case' as indicated below:
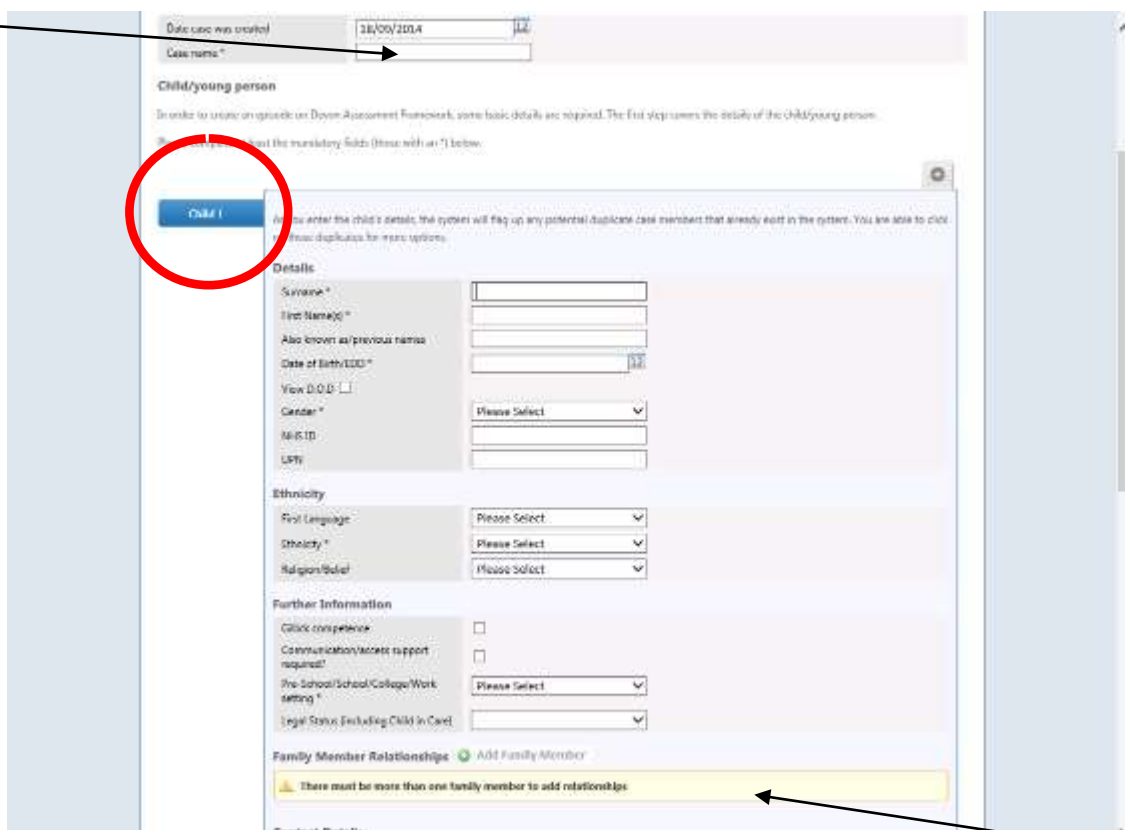
From here you will be taken to the case summary for the family.

1.5. Start new case

If no matches are found when you have checked for a case, you will have to start a new case. To do this you have to select the 'Start New Case' tab at the top of the screen.

Firstly you need to create a case name. The surname of the family and, perhaps, an initial is generally used for ease when determining cases you are working on. Try to **avoid pressing the 'enter' key or the 'tab' key** on your keyboard, instead click on the necessary buttons as featured on the system.

You will need to fill in the details of the primary child (Child 1) for the case first. Work your way through each question filling in as much information as possible. Mandatory fields for information have asterisks next to the question. At this point you will be unable to add the family member relationships as you are just starting the case, this field can be input once another child or adult has been added.

To add a secondary address for the child or another telephone number you will need to click on the plus tabs that are situated above the box for the relevant question. This is the same when adding a further child or adult to the case, you will find these tabs at the top of the details for the case member.

You will need a valid postcode when entering address details. Simply enter the postcode and click on the search icon as indicated below. A list of addresses, for that postcode, will appear in the subsequent box drop down box. If the address is a new build or BFPO address you will have the option to enter the details yourself as a 'Manual Entry' box will appear. Click on this box and enter the details you have. The box will only appear if you attempt to put in a postcode that is not valid.

It is recommended that you add one child and one adult family member first so as you can save the case. You don't want to risk losing information you have entered if HolistiX logs you out unexpectedly.

To add an adult to the case click on 'next' at the bottom of the page, where you have added the first child.. The 'cancel' key will take you back to the 'My Messages' screen and the 'reset' key will clear the page of the information you have entered.

Adding an adult is similar to adding a child. Work your way through each question, again, adding as much information as you can. Mandatory fields will have asterisks beside them.

At this point you will be able to select the 'parental responsibility' field. When you select the icon for this question the following box will appear:

Select the child that the adult has parental responsibility for. You will also be able to add the 'Family Member Relationships' by selecting the green plus icon.

This produces a drop down box where options such as parent, sibling or grandparent can be selected to form the family network.

When adding contact details you will need to select the plus tab as with the address field. An address is automatically pulled through from the child's details so if using the same address you can click the 'Select Known Address' option. The boxes will automatically be filled out for you.

Continue to work your way through the form.

When you reach the bottom of the page click 'Next'. Again, 'Cancel' will take you to the 'My Messages' screen and reset will clear the information you have entered.

You will be taken to the 'Significant Other' details page:

Remember, it is best to input family member information at a later date; this will be explained when you have created an assessment.

Click on 'next' and you will be taken to the 'Household Member' details page. Work your way through the pages until you reach the consent and coordination page, as shown below:

Here you need to select who the primary child is for the case and confirm that you have received consent to proceed with the Devon Assessment Framework.

Now you will be able to save your case by clicking 'Save Case' at the bottom or top of the page.

Once saved you will automatically be taken to the 'Case Summary' page, as shown below;
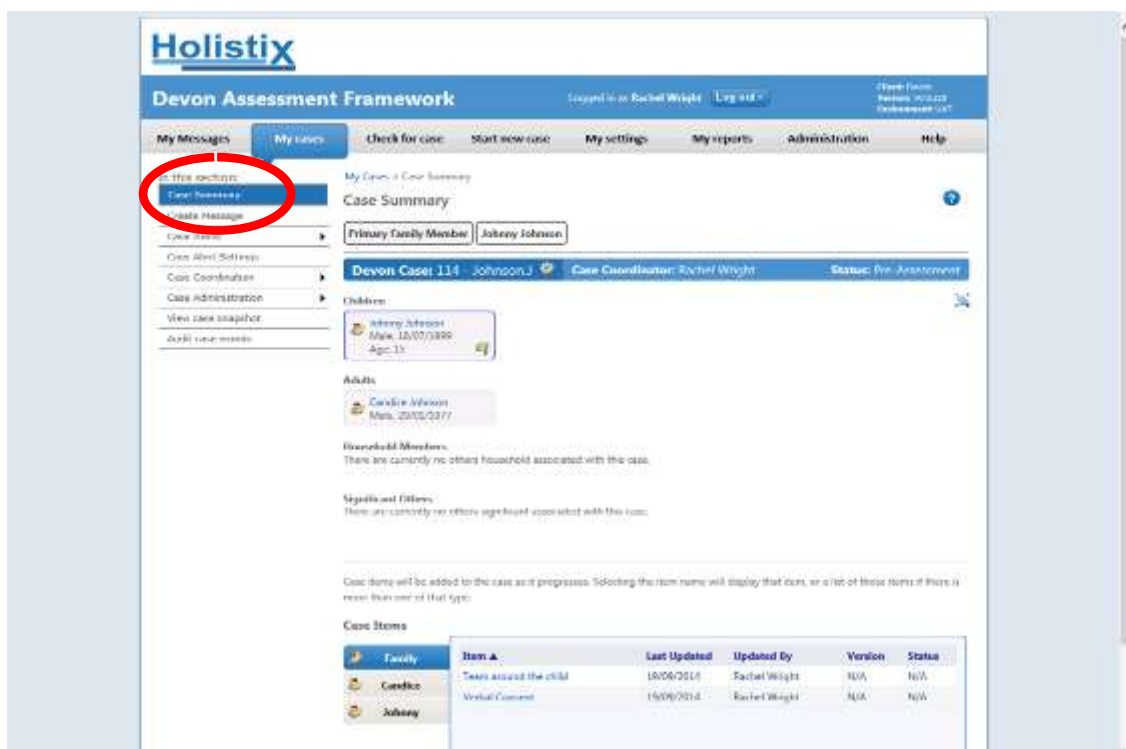
1.6. Printing the DAF Forms

You are able to print off any of the forms on HolistiX, either a blank form or pre-populated with the data already held in the form, by clicking on the printer icon shown below.
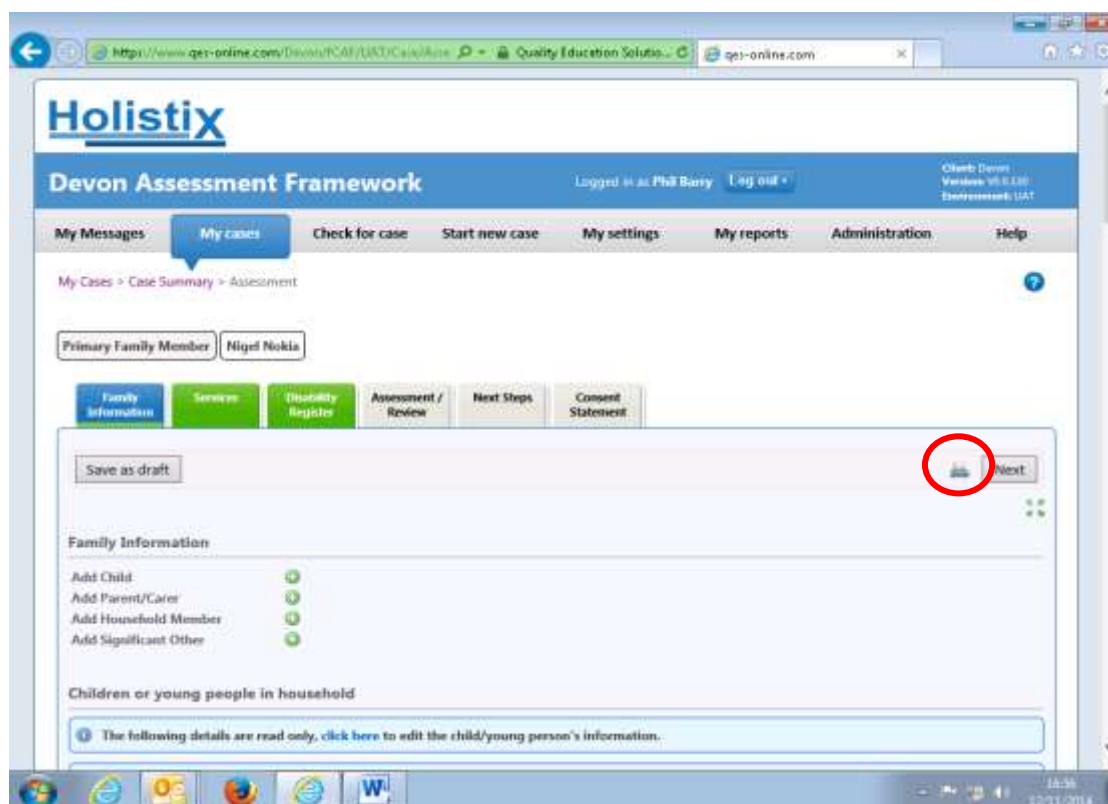
When the clicking on the printer icon, a box will appear at the bottom of the screen asking whether you wish to Open or Save the form, or Cancel the operation.
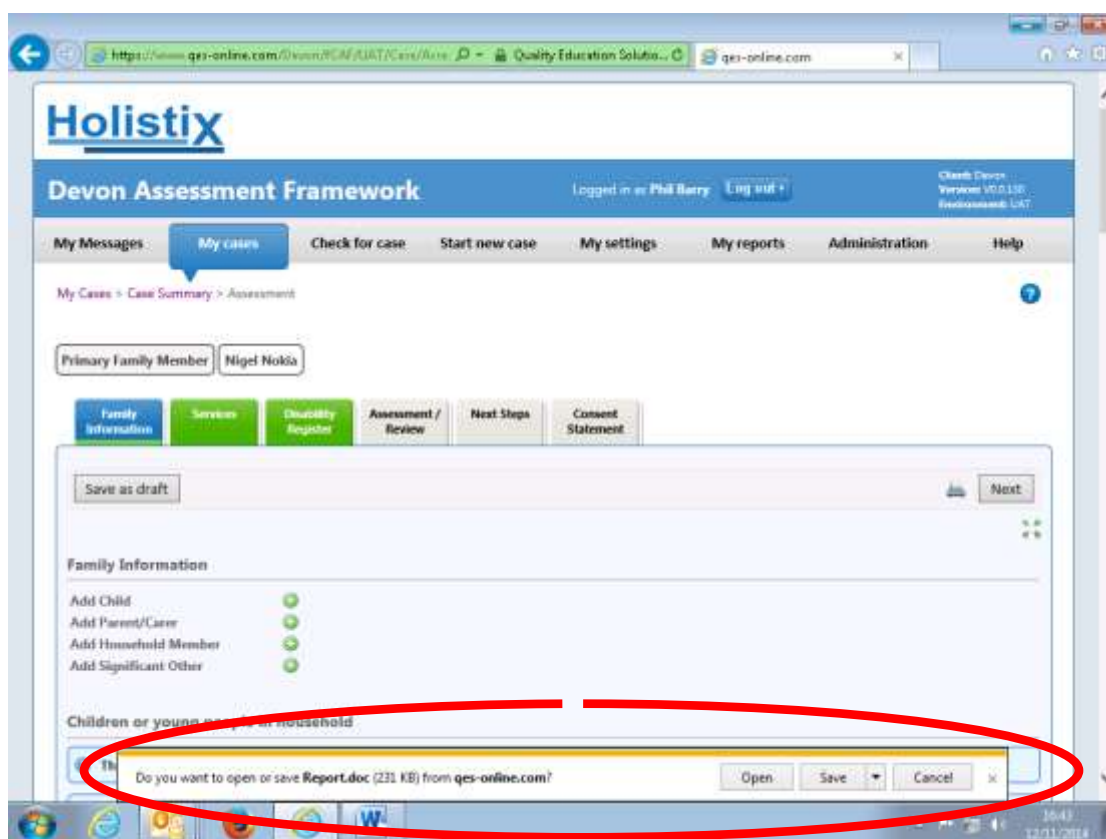
The same Printer icon is available on the DAF2a My Plan.
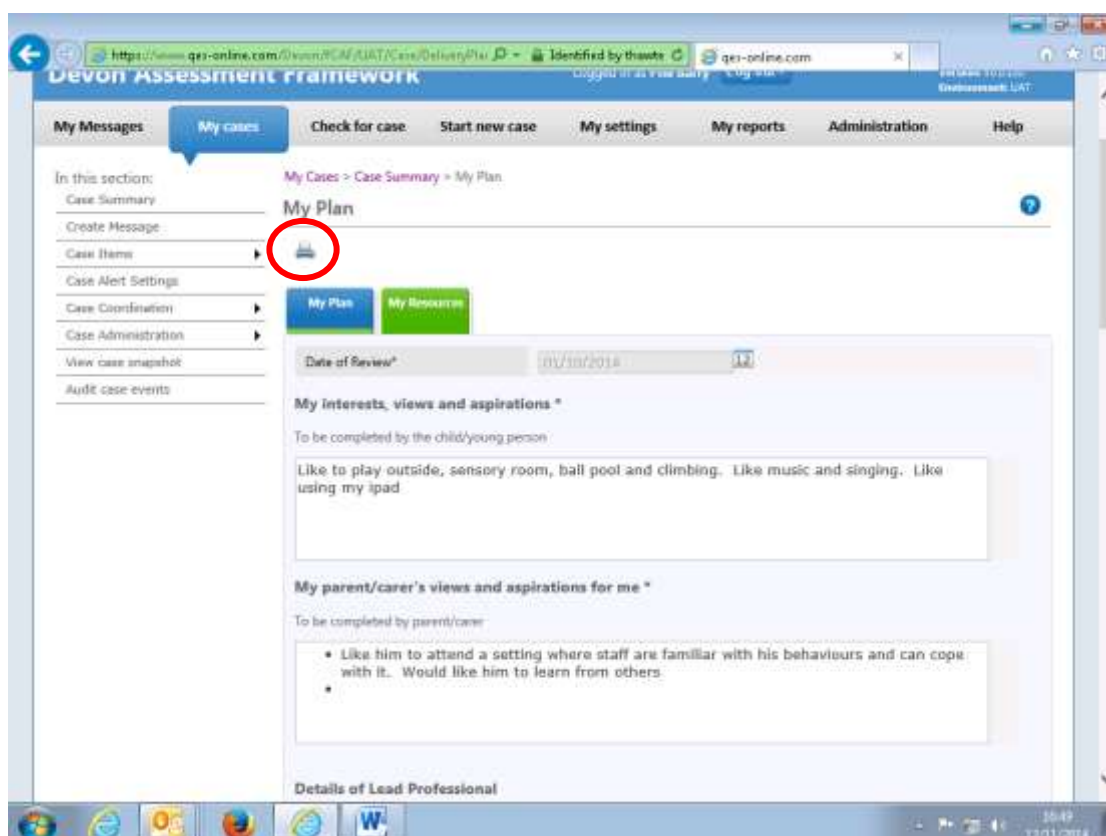
...and the DAF3 Request for Additional Resources…

2. TEAM AROUND THE CHILD

In HolistiX you will need to stipulate the members for the TAC meeting. It is at this point where you need to add all the family members and practitioners involved with the child & family.

To enter the TAC members you need to select 'Case Items' and then 'Team Around the Child' as indicated below:
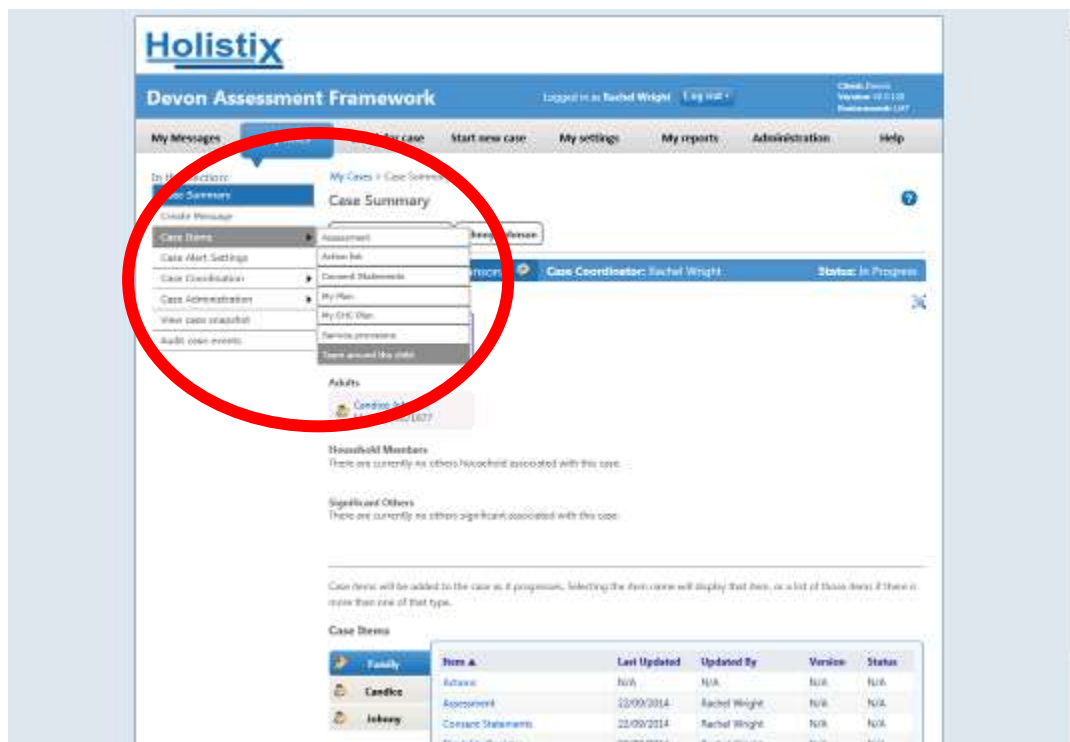

The following screen will be displayed:
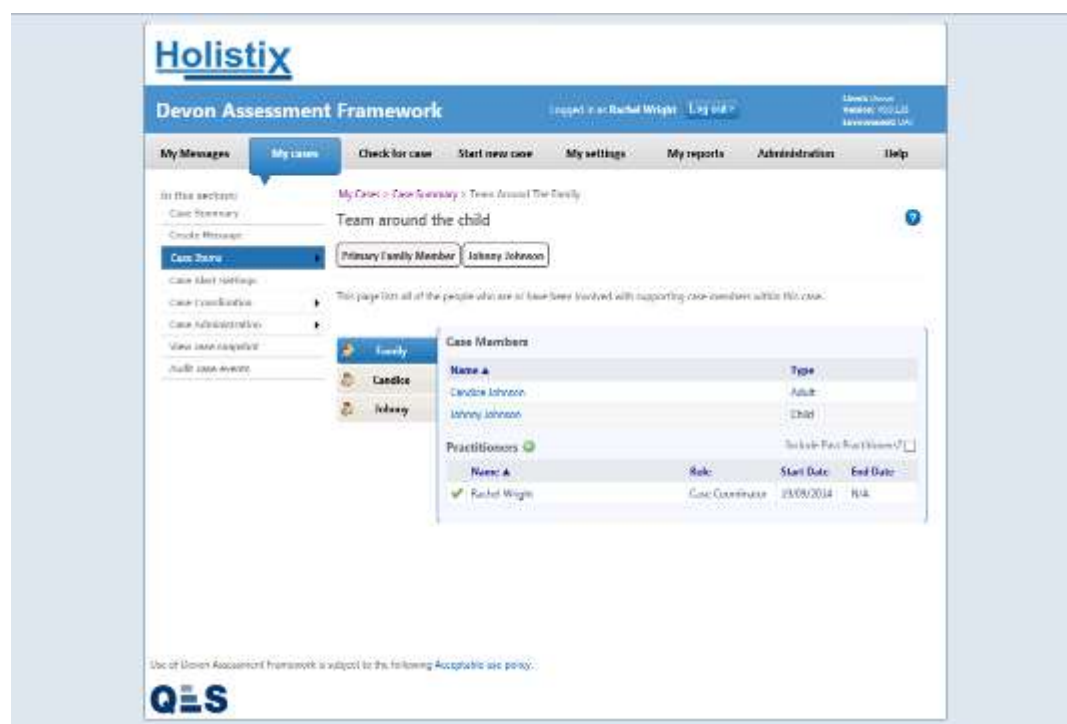
2.1. Add Family Members

To add family members you need to select the primary child tab and then the green plus icon:
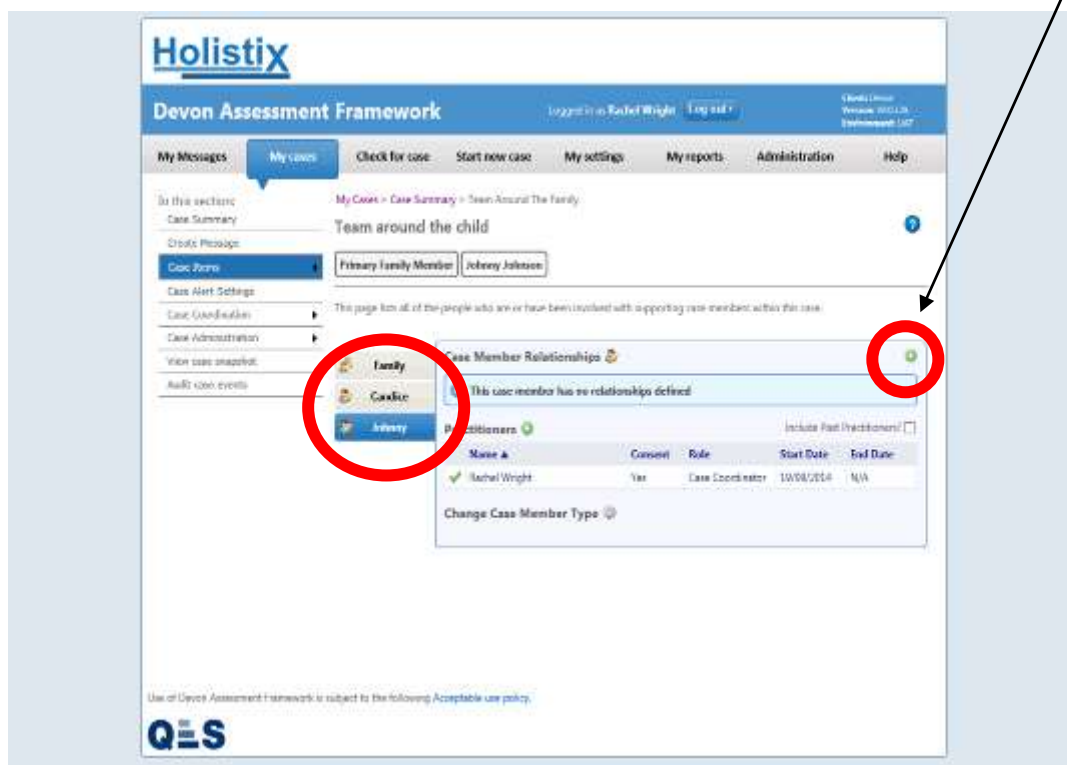
You will then see the following page. Firstly, you <u>must</u> select the case member type; a drop down list will appear containing the options for Child, Adult, Household Member or Significant Other. Select the appropriate member type.
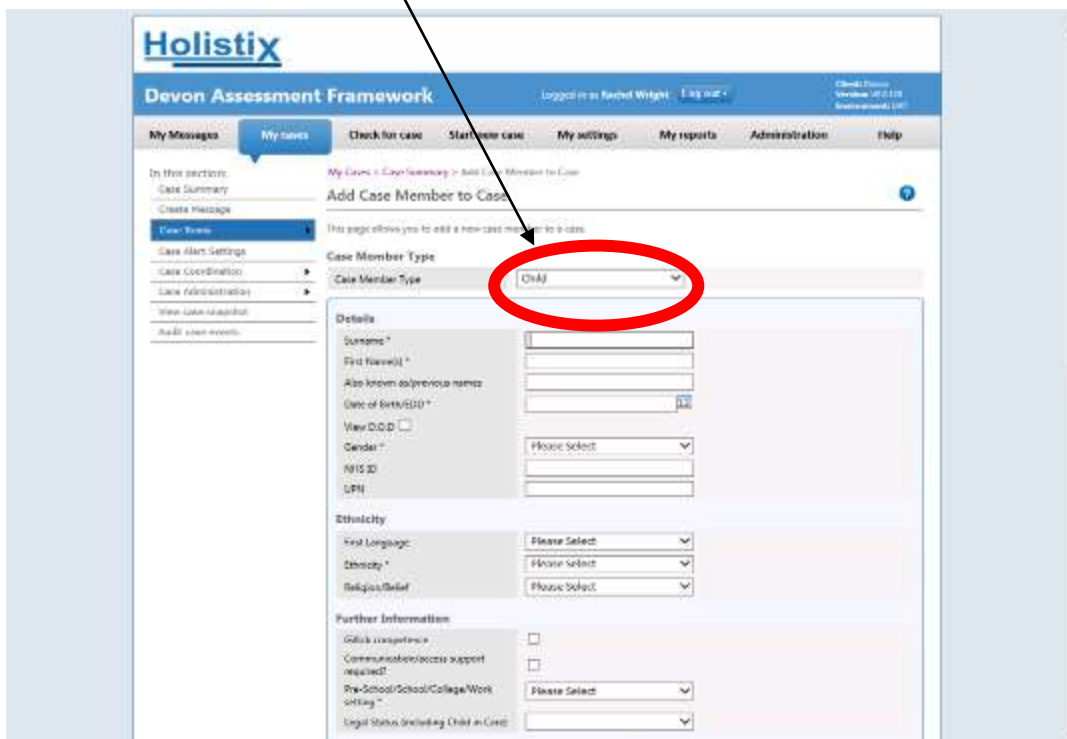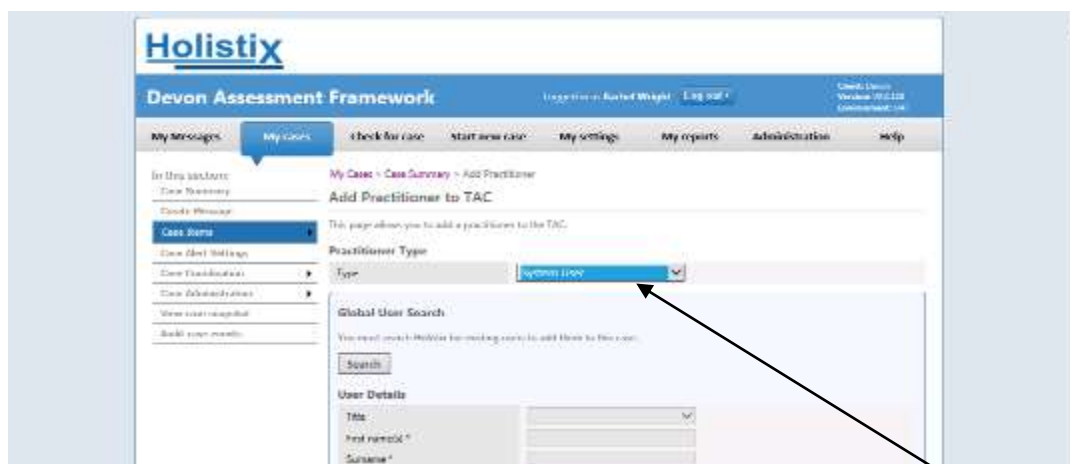

Continue to fill out the details, as before, mandatory fields have asterisks. When you have completed the details click 'save' at the bottom of the screen.

2.2. Add a Practitoner

To add a practitioner to the TAC you need to select the green plus icon as indicated:
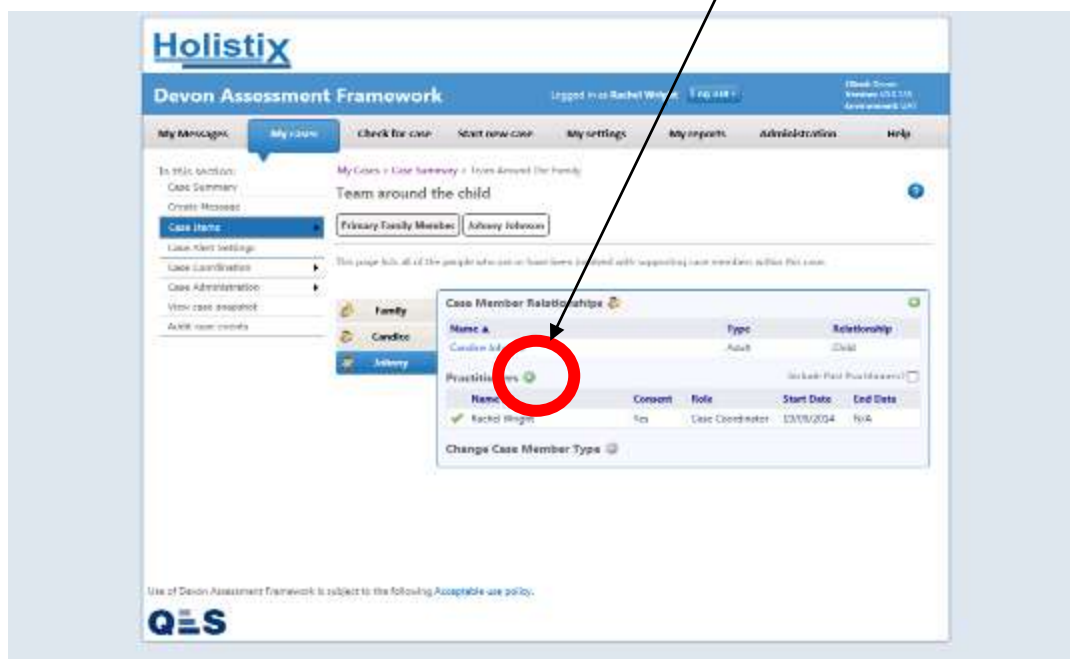

The practitioner screen appears as follows:

You can search for a practitioner, if they are also a user of HolistiX, by selecting 'System User' from the drop down and then click 'search'. If you type in the name for the practitioner and, perhaps, their national service list category to filter the results:
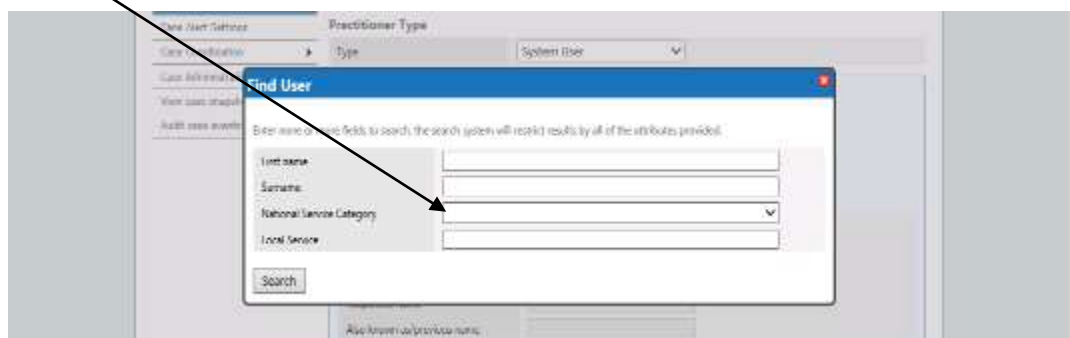
Select the practitioner from the list HolistiX will produce and click select. The practitioners details will automatically be filled out for you.
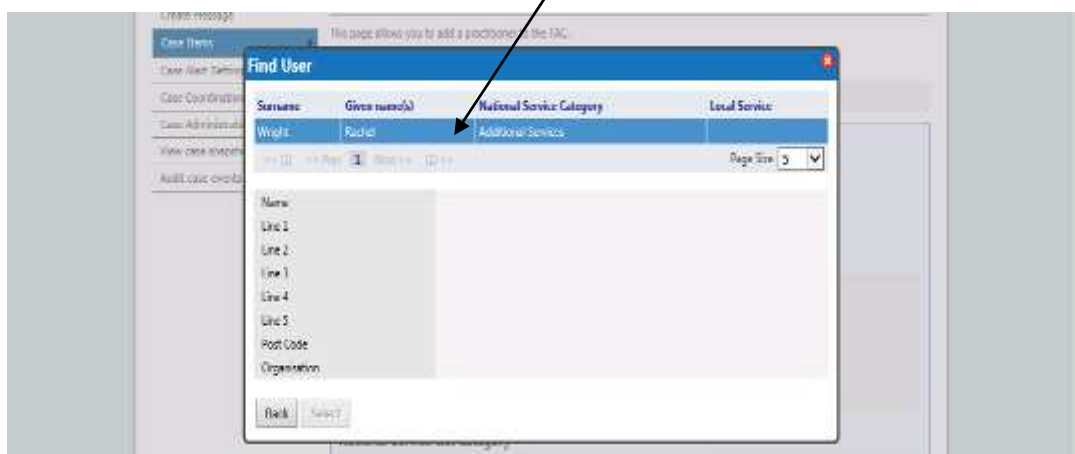
Select which case members the practitioner is working with by clicking the icon as indicated below:
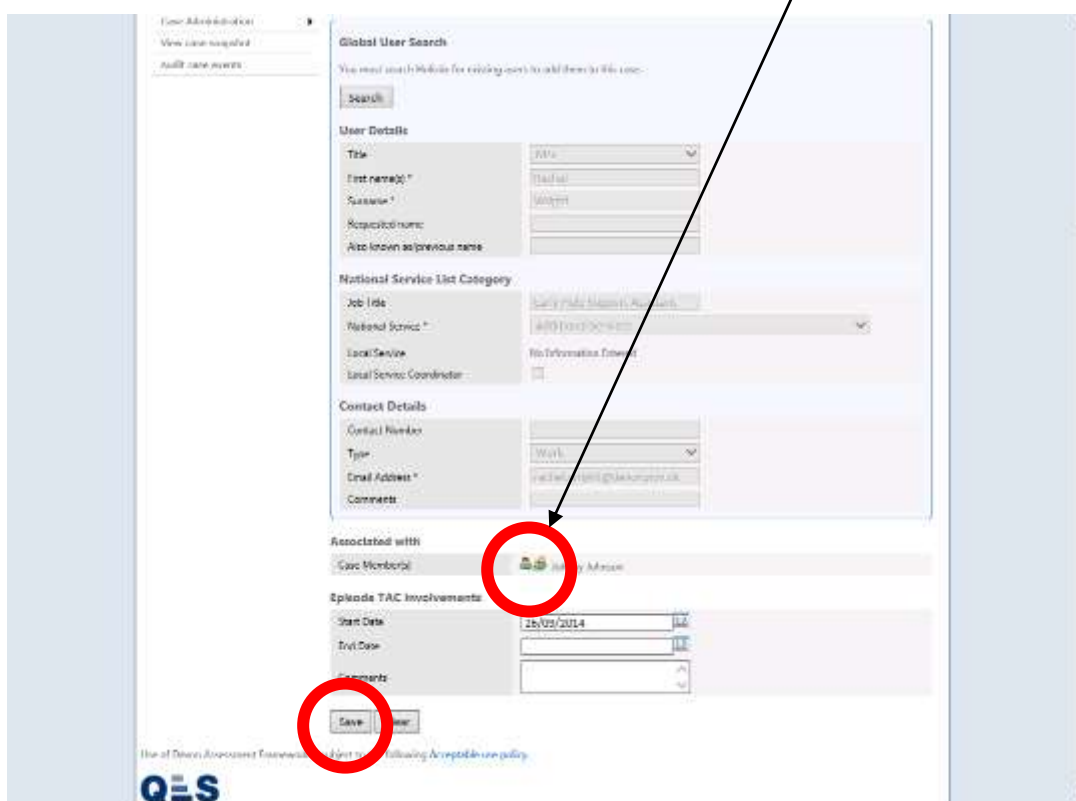
Continue to fill in the details when the practitioner started their involvement with the family/child but **leave the 'end date' blank if the practitioner is continuing to work with them**. Fill in any comments if necessary and click 'save'.

If the practitioner is not a system user then you wil have to select 'non-system user' from the drop down box, at the top of the page, and manually enter the practitioners details yourself.

Consent for practitioners to view the information in the DAF must be agreed on the original consent page when first entering the family details. If the service is not selected at the start then a new consent statement will have to be created. You can do this via the CASE COORDINATION menu and select 'Create Consent Statement'.

Continue to enter practitioner details following the process as described above. When you have finished you will be presented with the following screen:
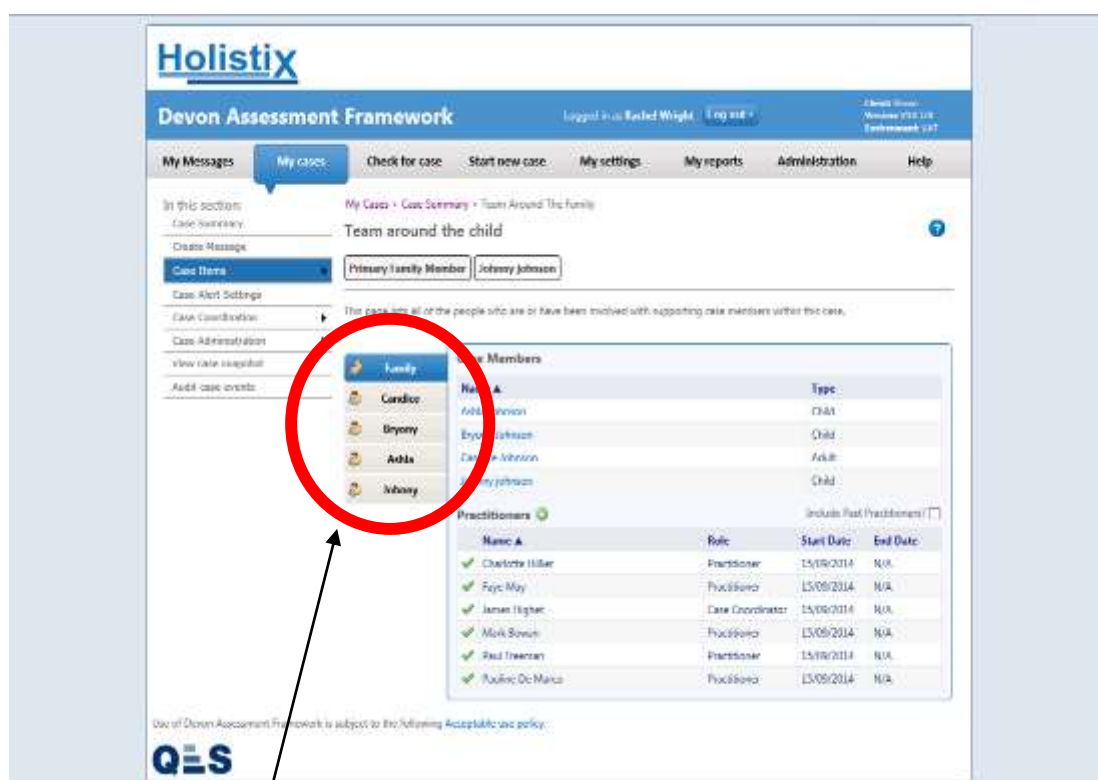
As you click through the tabs for individual family members you will be able to see how the list of practitioners changes for each family member. Confirm details and return to case summary screen.

2.3. Genogram

On the case summary page you will have the opportunity to view a genogram for the family by selecting the icon as indicated below;
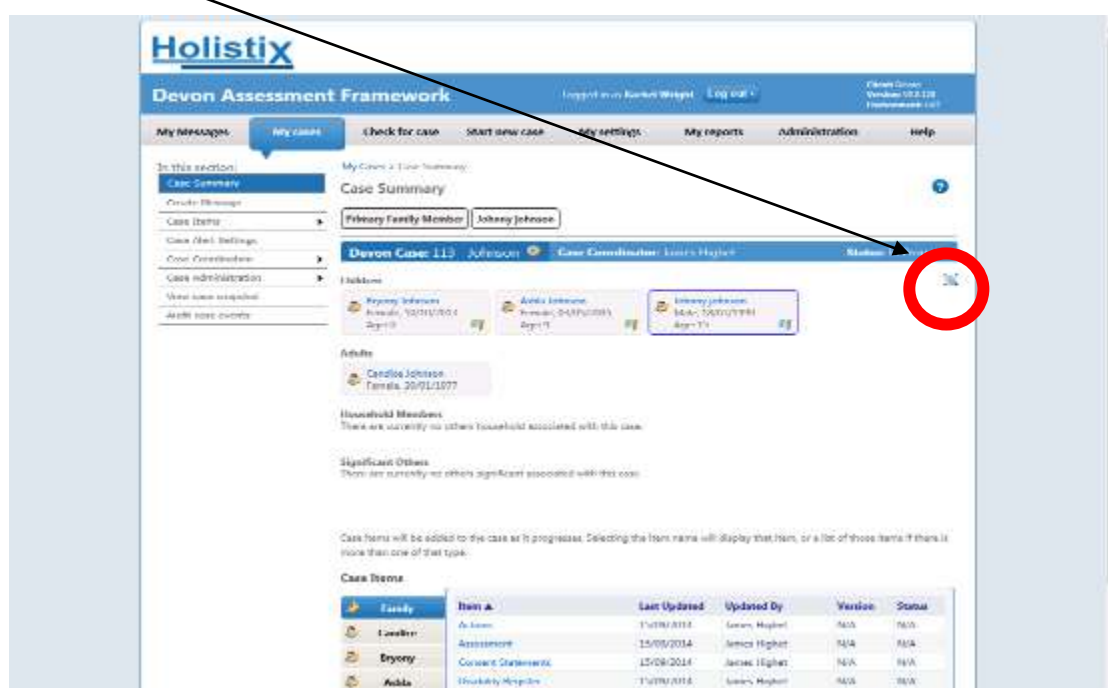
If you hover over the icons, as indicated below, it will give you the option to view the genogram full size, export the genogram for printing or view the standard genogram.

The genogram will not be displayed correctly if the family relationships have not been entered for the individuals in the family.

You can return to family member details, at any point, by selecting '**CASE SUMMARY**' from the 'In this Section' list on the left of the screen. You can click on the relevant family member that is displayed once you are in 'case summary' and from here you will be able to edit any details for the individual.

You can also access other parts of the DAF, for example, consent statements or Team Around the Child details from the case summary page. Simply select the required section you want to view, i.e. assessment, by simply clicking on the item in the 'case items' box or selecting the item from '**CASE ITEMS**' in the 'In this Section' list (left of the screen).
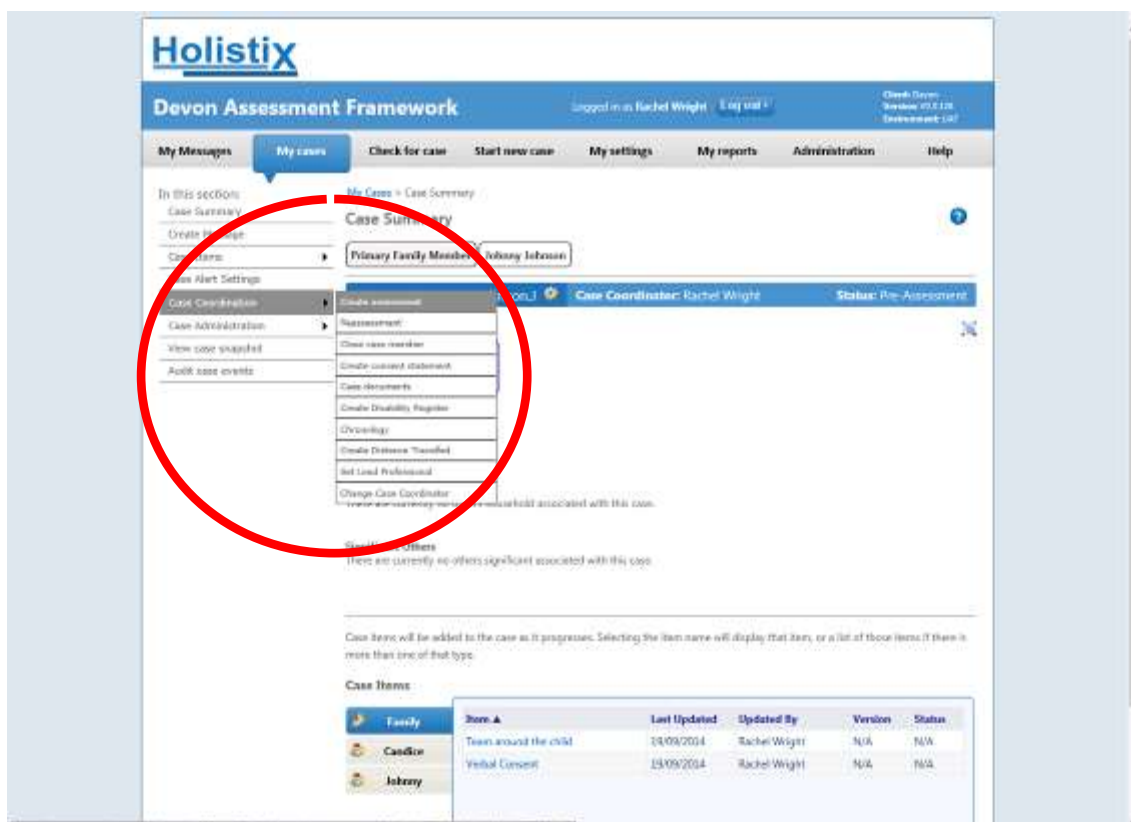

For your information: the primary child is always highlighted with a thicker outline on their box.

3. CREATING AN ASSESSMENT

To create an assessment for a family you need to select 'Case Coordination' from the list of options on the left of the screen. A drop down list will be provided where you can select 'create assessment':
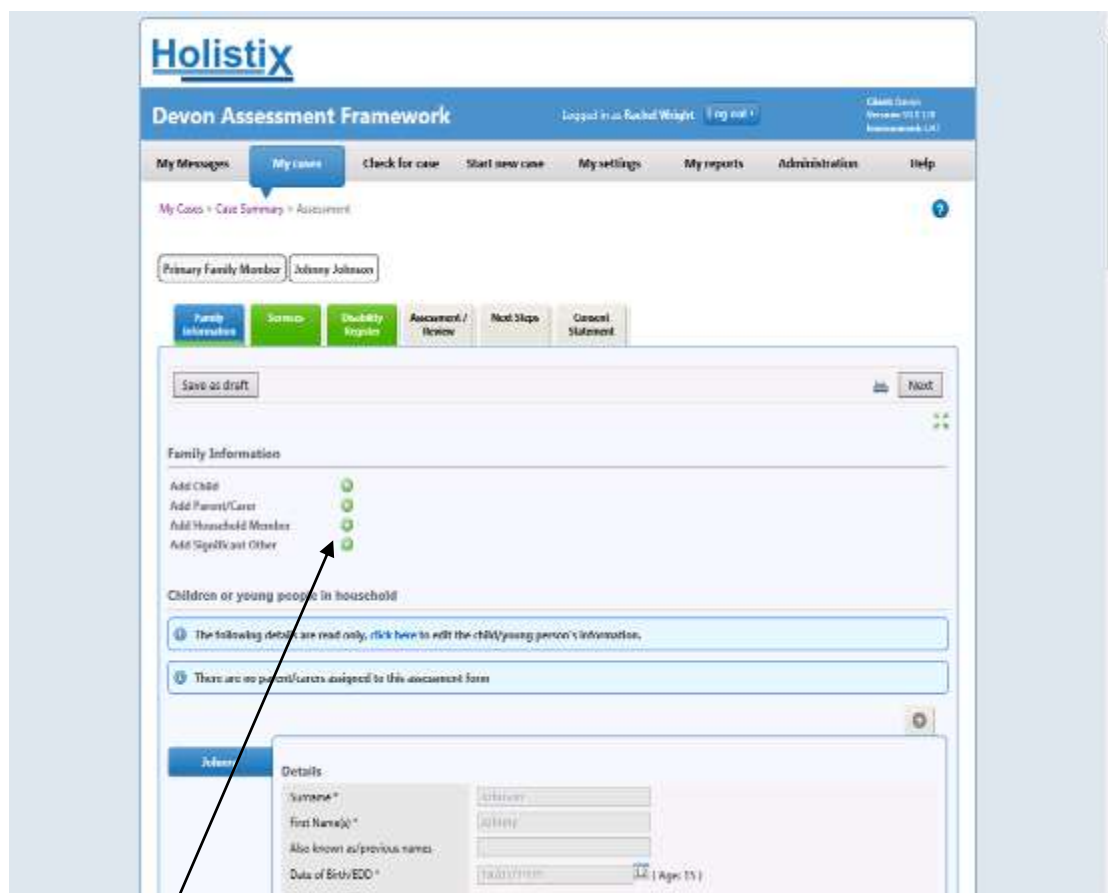

This will open a page where you need to stipulate the members of the family the assessment is necessary for (please tick the relevant family members' boxes) and click 'create assessment':
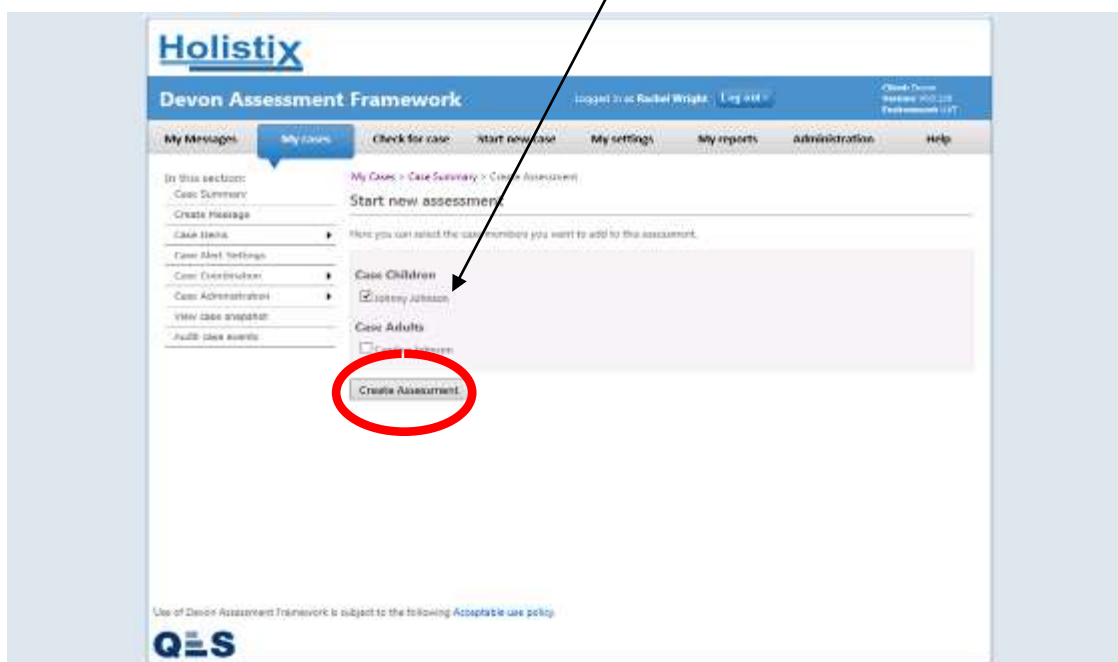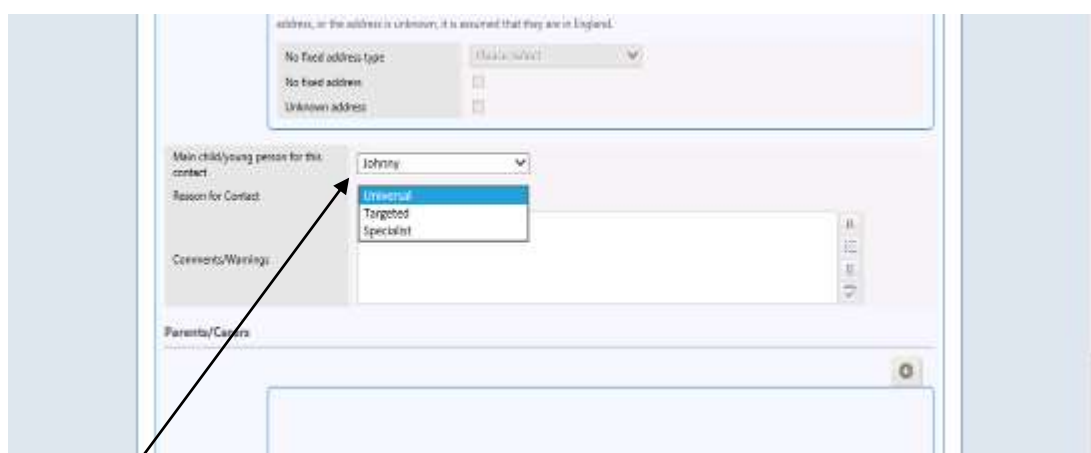
3.1. Confirm Child details

You will be taken to the first page that confirms the child's details:

You will also be able to add other family members at this point but **only if they are to be assessed through the Devon Assessment Framework.** To include another family member you need to select the green 'plus' icon dependant on the individual's relationship to the child.

Scroll down the page and confirm the details are correct. On this page you will come across the question 'Reason for Contact':

From the drop down list select the option for which the DAF is taking place, i.e. Universal, Targeted or Specialist.

Continue to confirm the details and at the bottom of the page you can 'save as draft'. **It is recommended you 'save as draft' as often as possible in case you are unexpectedly logged out of the system.**

Select 'next' to continue to the next page of the assessment.

3.2.   Services involved

The next section is the 'Services Involved With the Family' page:

To add a service, click on the green plus icon (Add Service) and you will be presented with the screen below:

Fill out the fields as appropriate, selecting the service name from the drop down list in the National Service List Category and then add the Local Service by selecting the icon as indicated below;

If you have entered details of the service in the National Service List question, the details will automatically be filled out in the shaded areas of the address fields.
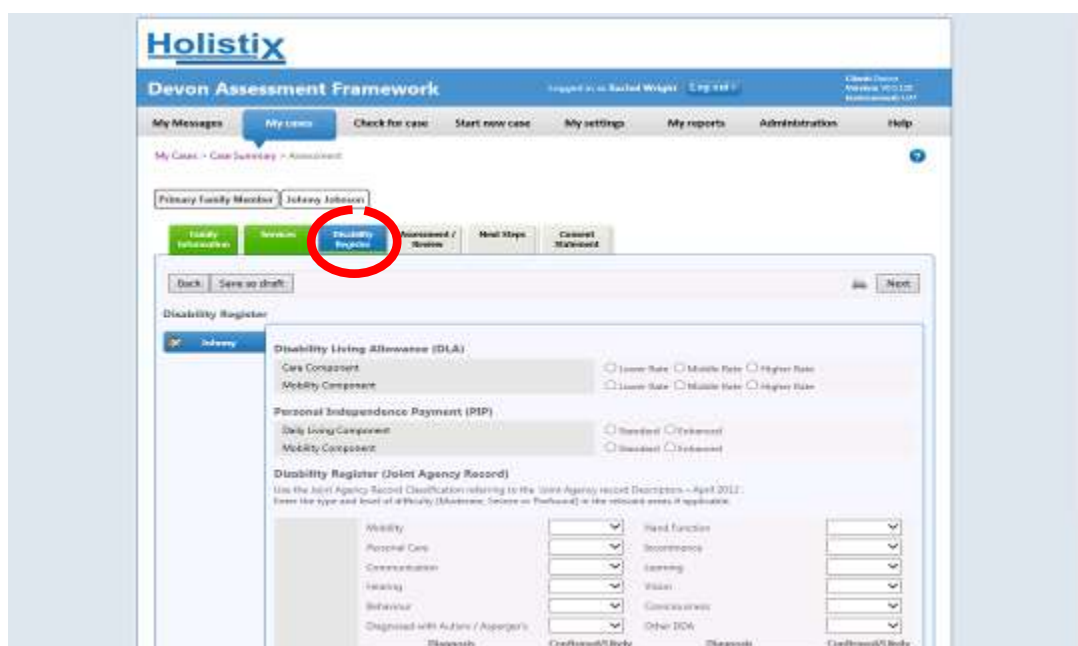
Select which family member/s the service is involved with by clicking the case member icon:

Enter the start date and end date, if you have them, and click 'save'.   When you have completed all of the services involved with the family click 'next', at the bottom of the page.

3.3.   Disability Register

The next section you will come to is the Disabilty Register:

The Disability Register is the same as is on the DAF paperwork that you may already be familiar with. For more guidance on this section, please refer to **DAF Practical Guidance**.

Fill in each box as nessary and click 'next' at the bottom of the screen. Again, remember to select 'save as draft' as you work your way through to reduce the chances of losing information.

3.4. Assessment / Review

The next section is the 'Assessment/Review' page of the DAF:

Work your way through the questions that you are familiar with on the DAF paperwork, 'save as draft' as you progress. For more guidance on this section, please refer to **DAF Practical Guidance**. When you have completed the questions click 'next' at the bottom of the screen.

3.5.   Next Steps

The 'Next Steps' screen follows the Assessment / Review screen. **As you can see the tabs will be shaded** green once you have completed each section **and shaded** blue when you are on the specific page you are filling out**.

❗ **Currently the Early Help Team are developing the process for to support MASH Enquiry and Family Group Conferencing so please ignore these questions for the moment.**

For the 'Completed By' section; your name as the initial coordinator for the case will automatically show in the drop down box.   A different Lead Professional may need to be idenitfied at a later date. You can enter those details following the TAC, or at any time during the DAF process. For now if no Lead Professional exists for the case select **No** for the question 'Lead Professional Agreed'.

3.6.   Consent

Finally you reach the 'Consent Statement' page:

You can select the members of the family the consent was granted for, basically the child/ren the DAF is intended for. Tick the boxes for the sharing of information and agreement for the information being recorded.

At this point you can stipulate which services the family has consented to by selecting the appropriate option, or you can consent to all if the parent agrees to numerous services. 'Yes to All' will appear in the Consent Options drop down box.

If you are satisfied that your assessment is complete you can 'save as final'. You will not be able to proceed to the TAC unless the assessment is completed as final.

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3.7.   Add Case Documents

When you have finalised your assessment you are requested to **upload the consent statement** onto the case in HolistiX. The following box will appear:
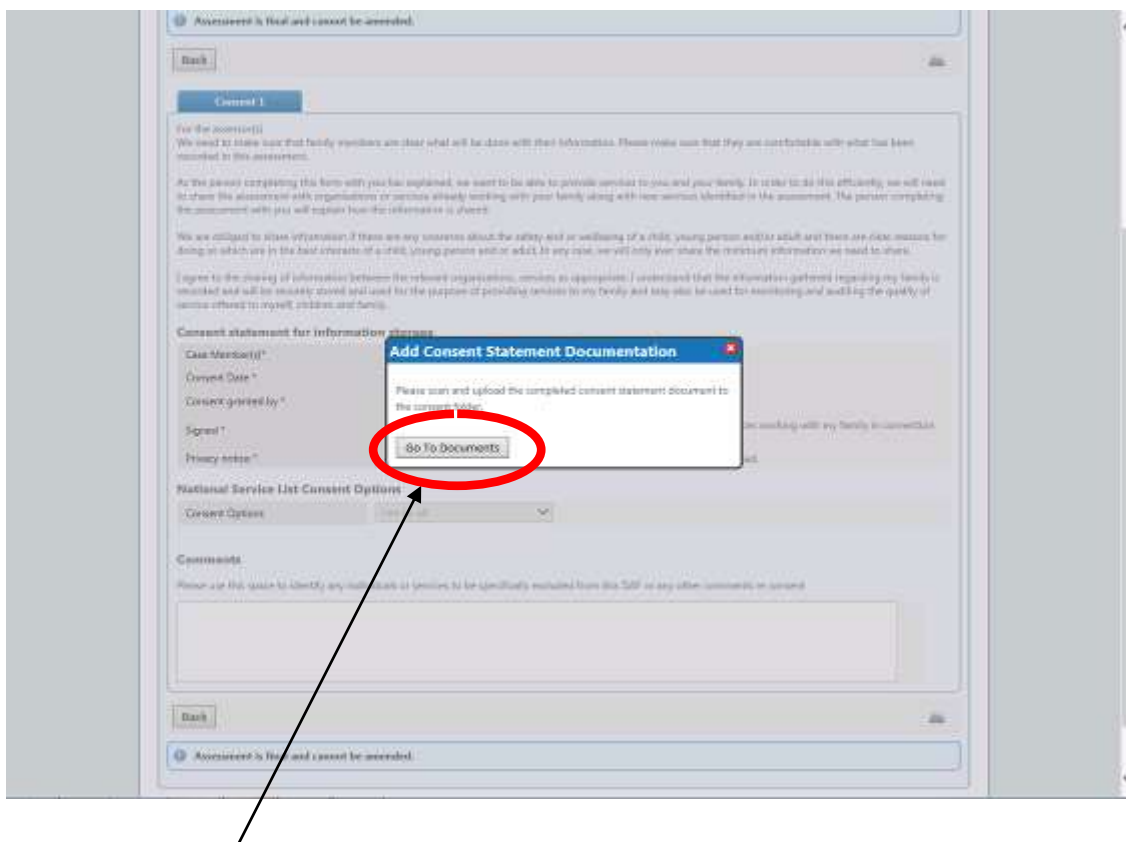
If you select 'Go to Documents' you will be taken to the screen below:
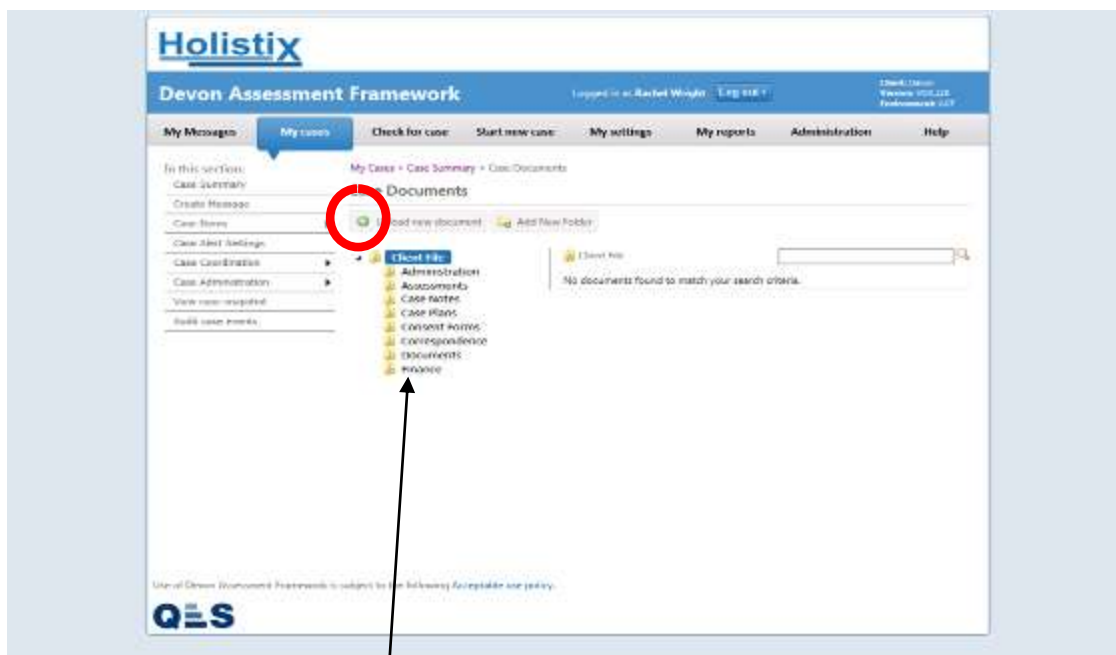
From here you need to select which folder you would like the document to go into and then select the green plus icon. You will then see the following screen:
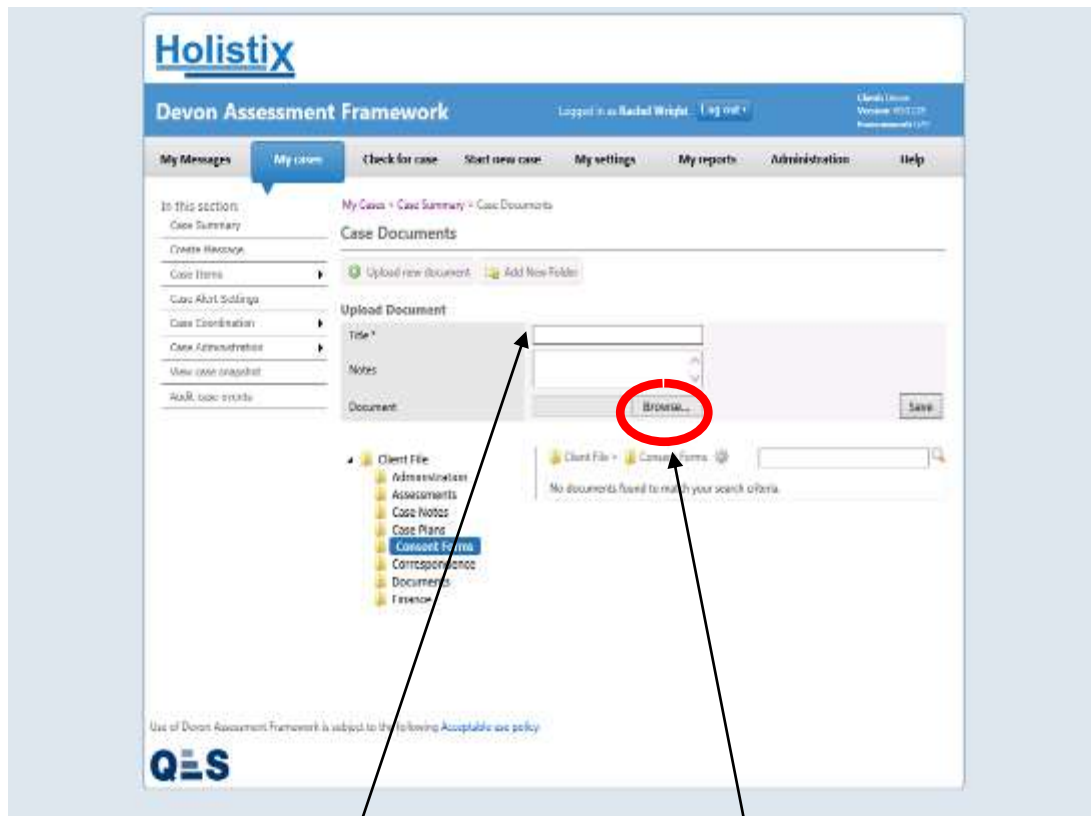
Here you will need to create a title for the document and browse your computer for where you have stored the document. Once you have selected the apprpriate file, click 'save' and the document will be uploaded. **You are able to change the folder you have put the document in by dropping and dragging, the folder you intend the document for will be highlighted in yellow.**

You are also able to access the documents screen at any time by selecting '**Case Coordination'** and then Case Documents, as shown below:
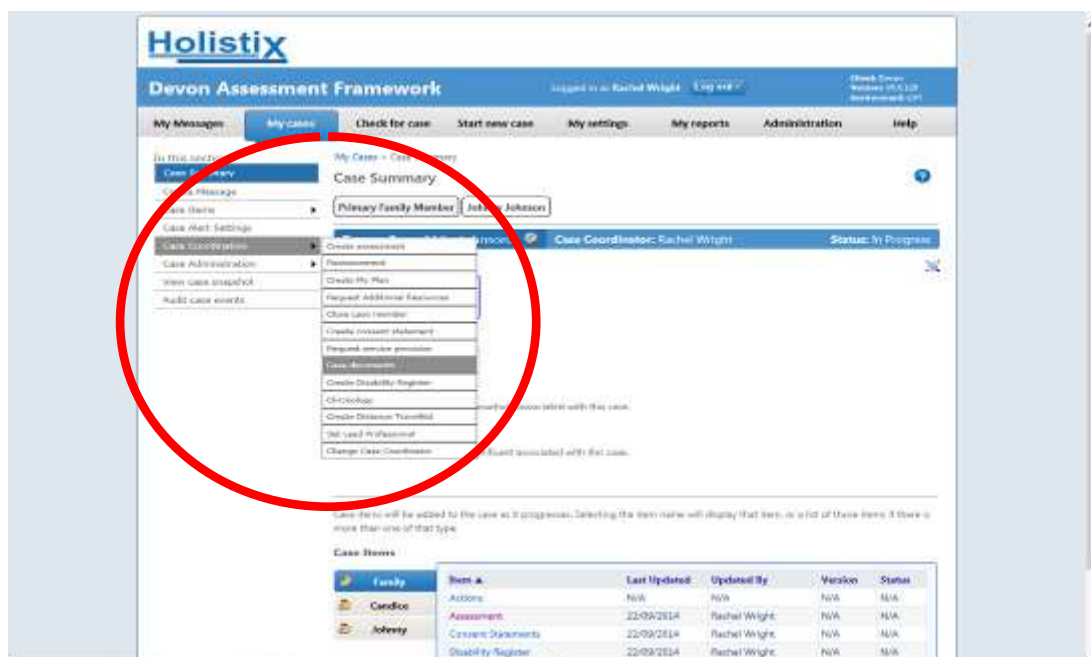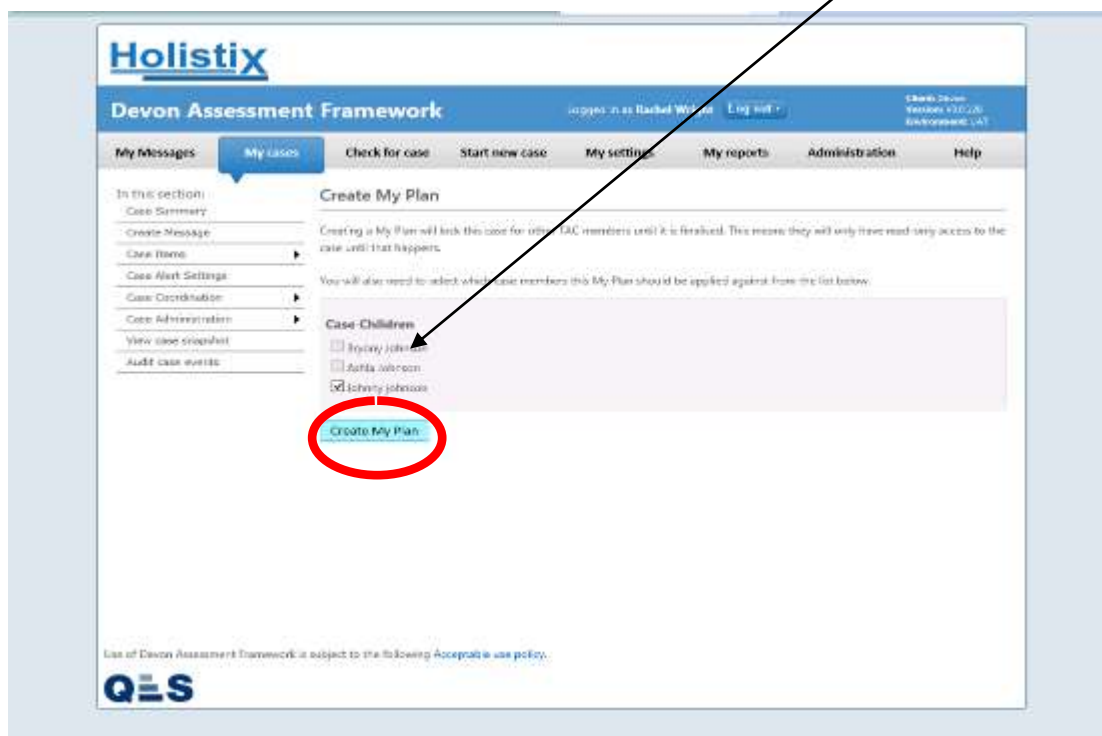
4. MY PLAN

To create a 'My Plan' for a child or young person you need to select Case Coordination and then 'create my plan' from the In This Section list:
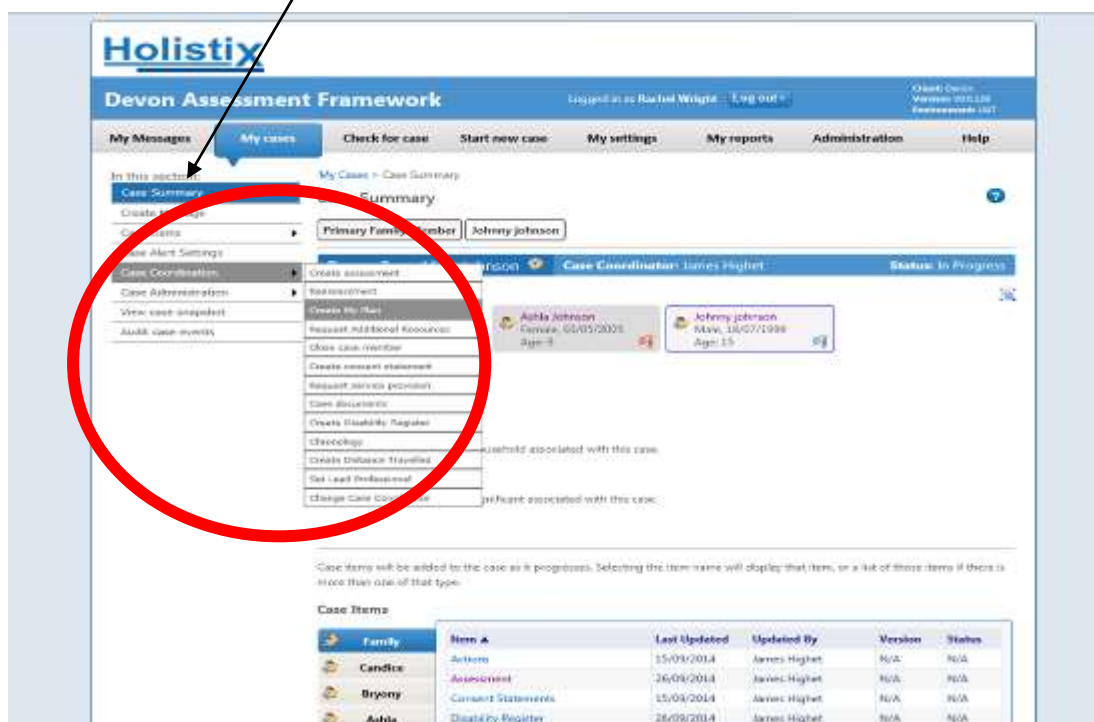
You will need to select which child or young person the 'My Plan' is for, so tick the appropriate box and click 'Create My Plan':

You will then be taken to the screen below:

Enter the date of the TAC in the 'Date of Review' field. Work your way through the form, which is very similar to the paper DAF form you may be familiar with, answering the questions as specified. For more guidance on completing this section, please refer to **DAF Practical Guidance.**

To add the agreed outcomes/actions for each section you will need to select the green plus icons as indicated above.

4.1. Adding actions

Once you have selected 'Add Action', you will be taken to the screen below;

You will need to start by selecting the 'Specific Area of Need' by selecting from the drop down box whether its Education, Health or Social Care. Again, mandatory fields are asterisked so work your way through the questions filling in as much information as you can.

If you have added the appropriate practitioners at the TAC meeting stage you can stipulate, from a drop down list, who will complete a specific action. To do this you need to click on the person icon (by hovering over the icon you can select whether you need to add a couple of individuals or the entire TAC members to complete the action).

When you are satisfied that you have captured all of the information click 'save' and 'Return to My Plan', at the bottom of the page.

Continue to add actions for the relevant fields, i.e. Parenting of the Child and Family Environmental factors.

4.2. Update / Review a Plan

When reviewing the 'My Plan' you will need to select My Plan from the **CASE ITEMS** menu on the case summary page. Select the required plan and click the settings icon to enable you to update about specific actions:
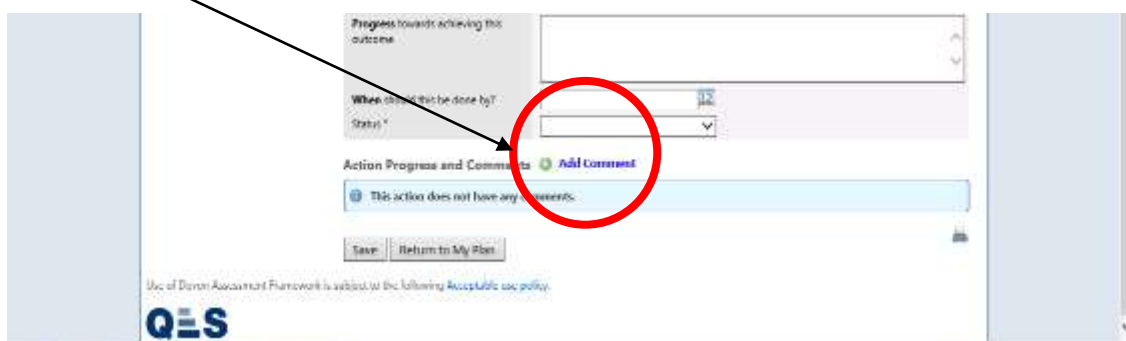

To add comments about the progress of an action in a plan you will need to select the green plus icon - **Add Comment** (as indicated):
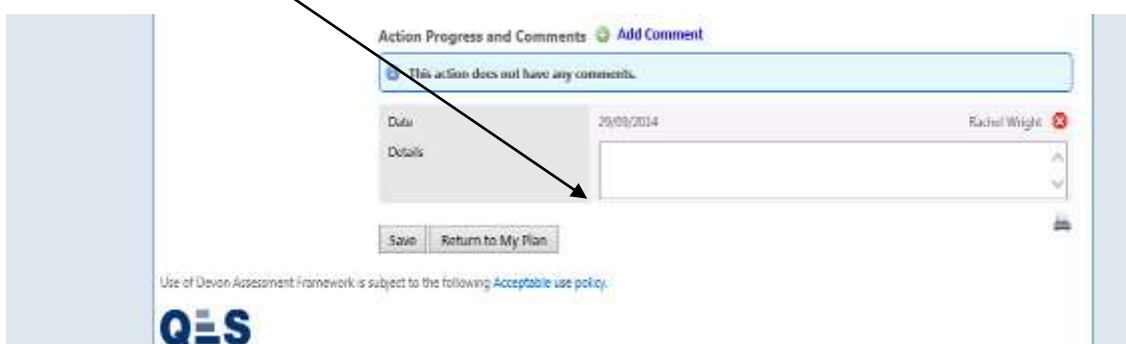
This is where you can add or update progress details about any of the actions in a plan, as required.

4.3. My Resources

To enter the current resources supporting the plan you need to select the 'My Resources' tab as shown below:

As with other sections you have already completed, work your way through the questions. Once you start to fill in some of the fields, HolistiX will total the figures for you. **Do not enter any commas or full stops for the figures as the system won't recognise them.**