



# Hull

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Children and  
Young People's Services

## **Module Ten Private Fostering**

### **CareFirst Version 6.8**



### **Integrated Children's System (ICS)**

**CAREFIRST HELPDESK: 616199**

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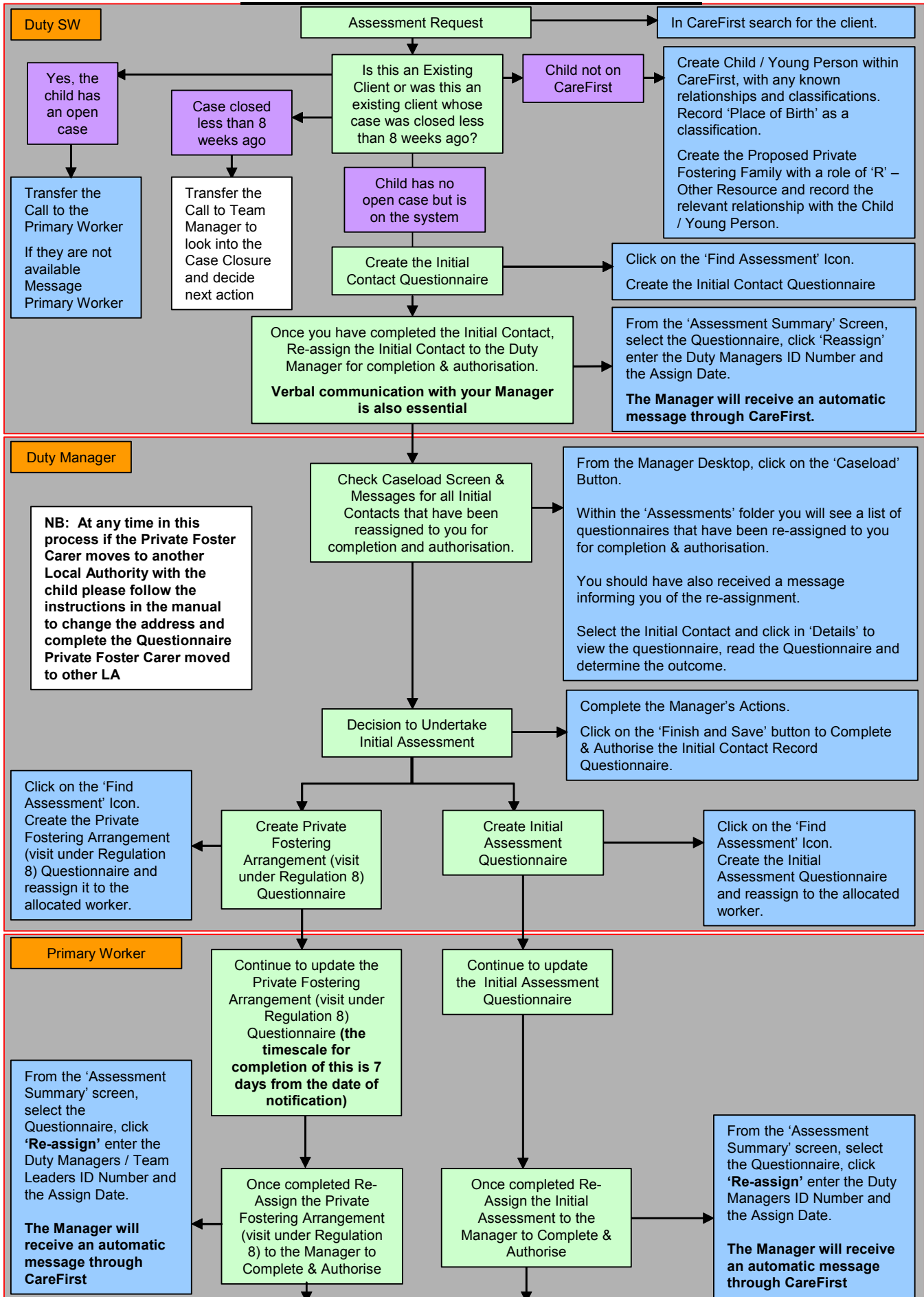
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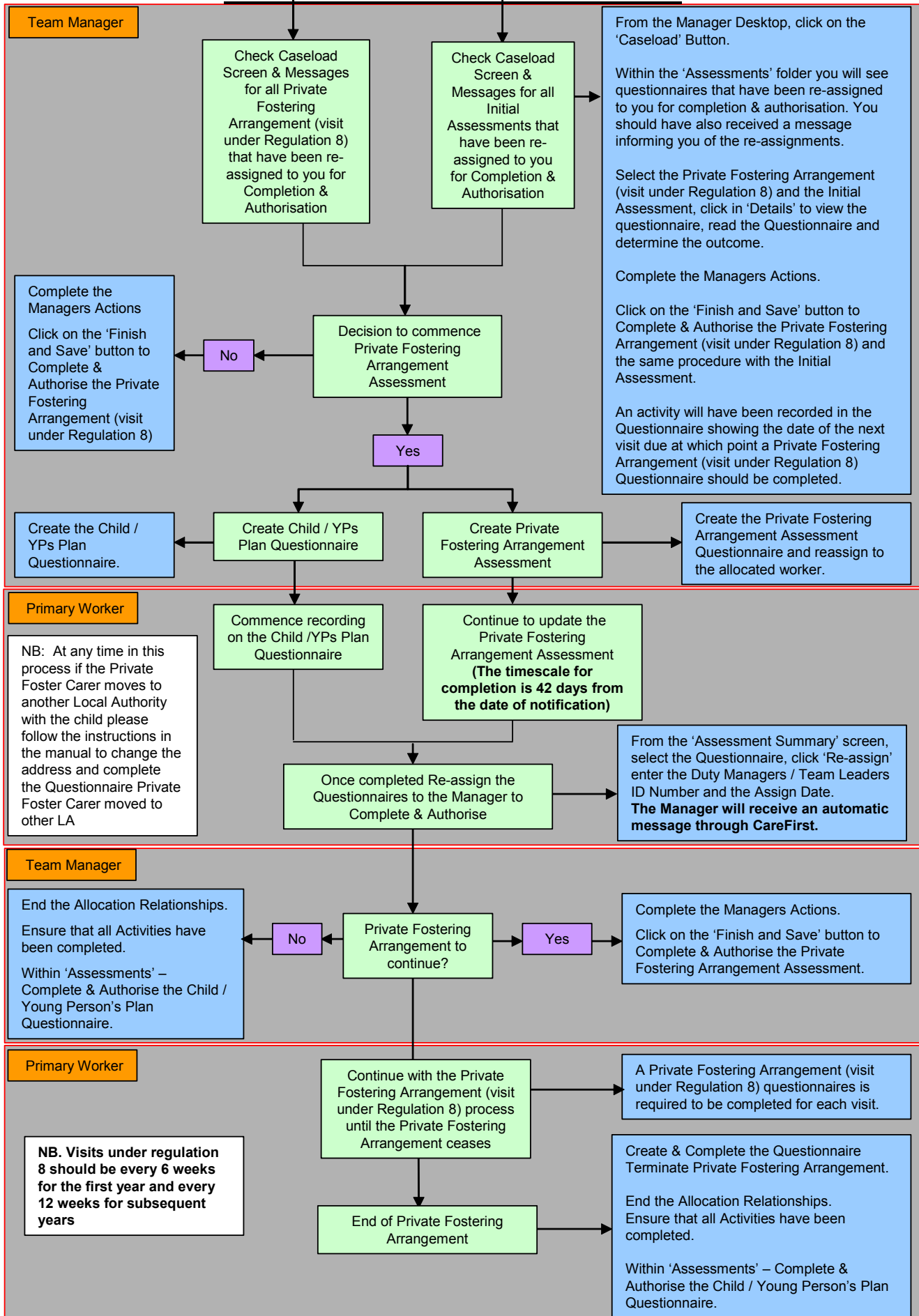
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## PRIVATE FOSTERING ARRANGEMENT



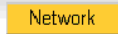
## PRIVATE FOSTERING ARRANGEMENT

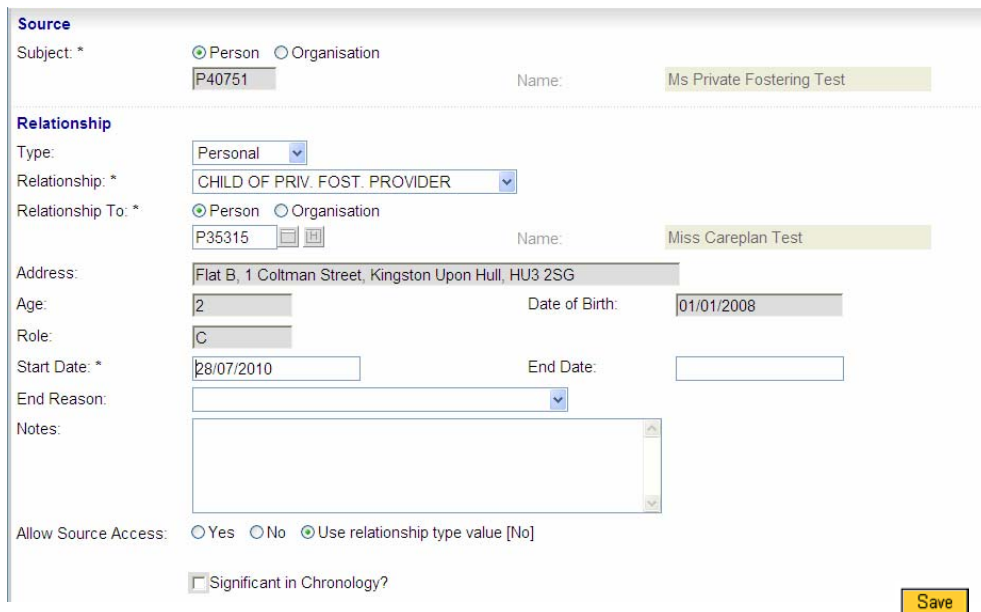


## Add the Proposed Private Fostering Family as a Relationship to the Child/Young Person

### Create Private Fostering Relationship

The Private Fostering Family may already be on CareFirst. If not, you will need to create them with a Role of 'R – Other Resource'.

1. From the 'My Client' Screen, click on the 'Network' button. 
2. Check the Relationships screen to ensure the relationship does not already exist. Click 'Add' to add a new Relationship.
3. The 'Add Relationship' Screen will appear. Complete all necessary fields as shown below:



4. 'Type' – Select 'Personal' from the pick list.
5. 'Relationship' - Because you are adding the Carer to the Child/Young Persons record you will need to select 'Child of Priv. Fost. Provider'.
6. 'Relationship to' – This should be set as default to 'Person'. If you know the CareFirst ID of the Carer, type this into the white box and click on the grey square, the name of the Carer should populate into the Name Field.
7. If you do not know the ID of the Carer, click on the Grey square to search for the Carer using the 'Find Person' Screen. **(If you need to create the carer they need to be given a role of R – Other Resource)**. Click 'Continue' to bring the person into the 'Add Relationship' screen.
8. **Start Date** – Enter the start date of the relationship. Double click for today's date.
9. Click '**Save**' to save the relationship (this should appear in the summary screen).



## Duty Social Worker/Primary Worker - How to Create an 'Initial Contact Record' Questionnaire

Initial Contact Records are recorded in CareAssess via a Questionnaire, through the 'Assessments Screen'.

1. From the 'My Client' Screen; Click on the 'Find Person' or 'Change Person' Link to search for the Client. (NB: If they are not on CareFirst, create them on the system.)

2. Click on the 'Find Assessments' Icon.



4. Click on the 'Add' button.



5. Complete the 'Add Questionnaire' Screen as shown below:-

**Add Questionnaire**

Application: \*

Questionnaire Context: \*

Assessment Type: \*

Priority: \*

Worker:    Name:

Team: \*    Team:

Start Date: \*

Significant in Chronology?

6. 'Application' –This is populated automatically by CareFirst.
7. 'Questionnaire Context' –Click on the down arrow, select 'Child/Young Person'.
8. 'Assessment Type' –Click on the down arrow and select 'Initial Contact'.
9. 'Priority' –Select the Priority of the Initial Contact from the pick list.
10. 'Worker' – Double click in the Worker ID field, the system will automatically populate the worker box with your id number.
11. 'Team' – The team information should default from the Worker ID you have just entered, if it doesn't you will need to manually enter your team ID.
12. 'Start Date' –Enter the date of the Initial Contact (double click for today's date).
13. Click the 'Save' button to add the Questionnaire to CareFirst.

**N.B:** If you select 'Cancel' before you save your questionnaire, the questionnaire will not be created.





**Answer all relevant questions in the different Sections available.**

**NOTE: (Required)** this denotes a mandatory field, if these are not completed when your manager authorises the questionnaire a message will appear informing them of the mandatory fields that still need completing and they will be unable to authorise the questionnaire

**Brown 'Hints' may also be shown to assist you in answering the question**

Contact Method (Required)  
How was the contact/referral made?

Answer: Telephone

**The next screen print will explain the 'Existing Answers' and Peek & Grab Function.**

Will show an existing answer to the Question above

What is the child's first language? (Required)

Existing Answers				Options
Start Date	End Date	Category	Notes	
18/09/2007		English		Remove from List   Edit

Add one answer only

Category: \*

Start Date \*:

End Date:

Notes:

This will remove the answer from the questionnaire.

Will allow you to edit the existing answer, with an end date/end

Clear will clear the information within the fields for you to re-enter correct information

'Add Classification' will update the Questionnaire with any information you have completed within the fields

'Peek' will check CareFirst for recent updates to this information

Add Classification Clear Peek

The yellow area will show an existing record which was entered in the main database. If someone has updated the client's basic details after the Questionnaire was created then this information will not show on the questionnaire.

Check the 'Existing Answers' to ensure these are up to date; you can also click on 'Peek' and to check will to see if anything has been updated (for this question only) following the creation of the questionnaire.

If there are no 'Existing Answers' complete the information within the fields and click on 'Add Classification' to add the classification to the questionnaire.

**Remember:** Information added in this way will not populate into the Main Database until the questionnaire has been authorised by the Manager.

**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

Any error messages shown will indicate problems with particular questions that have been answered.

**Section : Managers Actions**

This section needs to be completed by your Manager when the assessment is ready for authorisation.

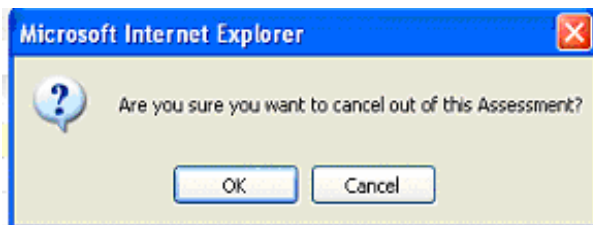
## Section: Preview All

To view this section, click on 'Preview All' from the pick list and click 'Go'. You will be shown a preview of all the sections contained within the questionnaire. The scrollbar can be used to move up and down to see all information.

After you have performed a 'Save' you have the option to carry on recording further information, or you can click 'Cancel' to leave the Questionnaire and if necessary return to it later.

**N.B:** The cancel button will only become available once the save has been performed in full by CareFirst.

**Note: You will only lose information if you have not 'saved' the questionnaire before clicking cancel. If you do cancel out of the questionnaire you will be prompted with the following message:**



Click 'OK' on this message (providing you have saved the information), you will then be returned to the Assessment Summary Screen.

**When you are satisfied that the information contained within the Questionnaire is complete and correct, the questionnaire will need reassigning to your Manager for authorisation. You should also be communicating verbally with your manager.**

**NOTE: Once Questionnaires have been authorised, they cannot be amended.**

## Saving the Questionnaire

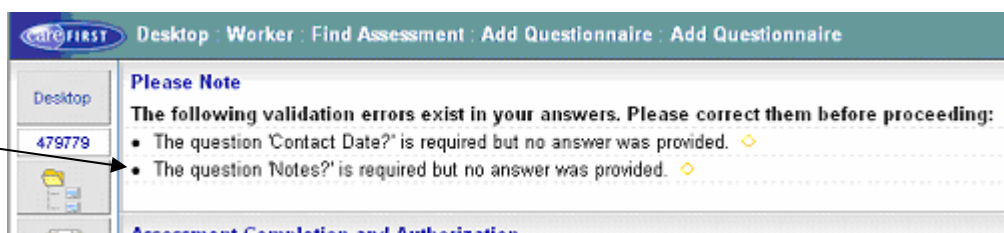
You can save the Questionnaire at any point by clicking onto the 'Save' option.



13. It is suggested that at this point you should click on 'Finish and Save'. This will take you through to the 'Assessment Completion and Authorisation' Screen you're your Manager will use to authorise the Questionnaire.

14. You will receive notification of any Mandatory fields that have not been completed, This gives you the chance to complete them before reassigning to the Manager for authorisation.

This shows the Mandatory (required) fields that have not yet been completed.



**Note: If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.**

**Any error messages shown will state the question experiencing a problem.**

**15.** Click '**Cancel**' –You will be returned to the previous screen.

**16.** Go back through the sections to correct the information.

**You have now completed the recording for the Assessment.**

**You will now need to reassign the 'InitialContact' to the Manager for authorisation.**

## Duty Social Worker/Primary Worker to reassign 'Initial Contact' Questionnaire to the Manager for Authorisation

In order for the Questionnaire to be authorised the Worker must reassign the Initial Assessment Questionnaire to the Duty Worker the Team Manager will access this desktop to find questionnaires to Authorise. By undertaking this process of reassigning, the assessment the Manager will receive an automatic message via CareFirst informing them that the assessment has been reassigned and the Assessment will also sit in the Managers Caseload Screen. There is still a need to verbally communicate that you have done this with your Manager.

1. From the 'Assessment Summary' Screen; click on the 'Reassign' button. This will take you into the 'Reassign Assessment' Screen as shown below:-

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
1 Initial Contact	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input checked="" type="checkbox"/>

Selected record questionnaire

File Locations Abandon Duplicate Reassign History Outcome Details

Will reassign the selected questionnaire

2. 'Worker' – Enter the ID number of the **Duty Worker** the Team Manager will access the Duty Workers Case Load screen.
3. 'Team' – The team information should default from the Duty Worker ID you have just entered, if it doesn't you will need to manually enter the Team ID.
4. 'Assign Date' – Enter date assigned to the Manager for authorisation.
5. 'Saving the Reassignment' – Click on the 'Save' button and this will prompt a message advising 'Notification will be sent to a new assignee'.



6. Click 'OK' on this message, you will then be returned to the 'Questionnaire Summary' Screen.

## Manager to Complete & Authorise the 'Initial Contact Record' Questionnaire

The Manager will have received a message via CareFirst to inform them that a Questionnaire needs to be completed and authorised.

1. From the 'My Client' Screen; Click on the **Find Person** or **Change Person** Link to search for the client.

2. Click on the '**Find Assessment**' Icon.



3. You will be shown the '**Find Assessment**' Summary Screen.

Assessments - 1 to 1 of 1 records										Add
Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select		
1 Initial Contact	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>		

1 Initial Contact  
Child / Young Person

File Locations Abandon Duplicate Reassign History Outcome Details

4. Select the '**Initial Contact Record**', by either clicking on the record, or placing a tick in the '**Select**' tick box – the record will turn yellow when selected.

5. Click the '**Details**' button to view the Questionnaire

You can use the **WYSIWYG** (What You See Is What You Get) to preview the full questionnaire by clicking on the Mini Print icon in the right hand corner of the assessment block.

Read and check all information on the questionnaire, you can move to each different tab/section by either clicking '**Continue**' to move to the next Section, or click on the down arrow next to '**Section**' and select the next Section on the list, you will then need to click '**Go**' to move to that Section.

**THE INFORMATION CANNOT BE AMENDED ONCE THE QUESTIONNAIRE HAS BEEN AUTHORISED.**

6. When you have checked all Sections of the questionnaire go to the '**Managers Actions**' Section.

1 Initial Contact - This assessment is assigned to Mrs Patricia Anne Western. 25/01/2011

Master Gender Test P62546

Address: 10, Anlaby Road, KINGSTON UPON HULL, HU1 2PA

Telephone: \_\_\_\_\_ Gender: \_\_\_\_\_

Date of Birth: 01/01/2010 Age: 1

Worker Name: Mrs Patricia Anne Western Team Name: Information Systems Team (Headquarters)

Assessment Type: 1 Initial Contact

Start Date: 25/01/2011 Score: 0

Score Breakdown - 0 records found

Hide Header - Cancel Save Back Finish and Save

Questionnaire Section: Manager's Actions Go

Primary Team: \_\_\_\_\_

7. If some of the Mandatory fields have not been completed at this point, you will receive a notification as shown below:-

Mandatory (required) fields that have not yet been completed.


8. Click 'Cancel' to take you out of the questionnaire.

**N.B: The Manager should send a Message informing the worker to update the required fields within the questionnaire. (Verbal communication is also essential)**

12. When the Questionnaire is ready to be authorised, go to the 'Managers Actions' Section and click 'Finish and Save' button the 'Assessment Completion and Authorisation' Screen will appear as shown below:-

13. 'Share Data' – Do not use.
14. 'Details' – Do not use.
15. 'End Date' – Please enter the end date for the questionnaire.
16. 'Priority' – Please select the priority from the pick list.
17. 'Outcome' – Select the relevant option (i.e. Initial Assessment).
18. 'Reason Code' – Click on the down arrow and select the appropriate option.
19. 'Initial Contact Outcome' – Enter appropriate outcome from the list.
20. 'IC Completed Date & Time' – Enter appropriate date and time.



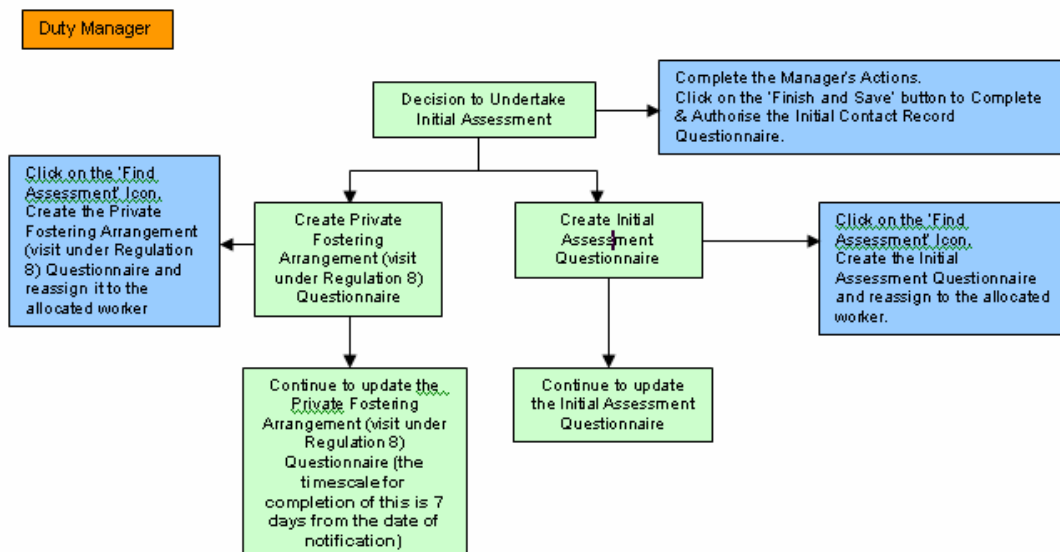
21. 'Completed By' – Enter your ID Number, double click in the field.
22. 'Authorised by' – Enter your ID Number, double click in the field.
23. 'Authorise Date & Time', 'Completed Date & Time' and the 'Completed' tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
24. 'Authorisation Comment' – this box can be used to record a comment relating to your authorisation, however this must not be used as a case recording tool.
25. Click 'Save' to complete and authorise the Questionnaire. 
26. When the save has been completed successfully the authorisation will now be complete, the Questionnaire will display in the summary screen.



Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
4 Child / Young	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>
2 Initial Assessment	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>
1 Initial Contact	Child / Young	Patricia Anne	Child/Y	0	25/01/2011		N	<input type="checkbox"/>

Completion Status of Questionnaires

## Follow the next stage in the flowchart



If a Decision has been made to undertake an Initial Assessment please continue to follow the instructions.

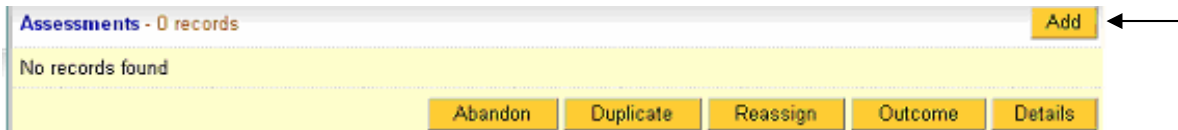
The instructions for the Private Fostering Arrangement Assessment Questionnaire will follow.

Both assessment questionnaires will run concurrently.

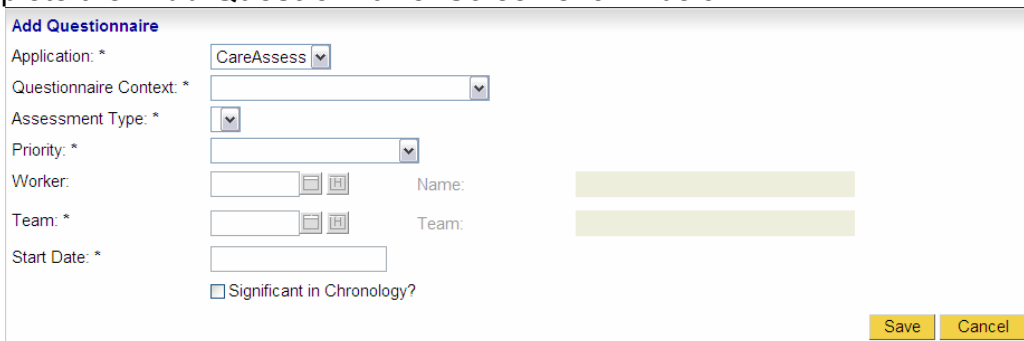
## Manager to Create an 'Initial Assessment' Questionnaire

Initial Assessments are recorded in CareFirst as a Questionnaire, through the 'Assessments' Screen.

1. From the 'My Client' screen click on the 'Find Assessments' icon to create the questionnaire.
2. Click on 'Add' to add the Questionnaire (within the Assessments Part of the Screen.)



Complete the 'Add Questionnaire' Screen shown below: -



3. 'Application' – This is populated automatically by CareFirst.
4. 'Questionnaire Context' –select the context of 'Child/Young Person'.
5. 'Start Date' – Enter the start date of the Initial Assessment.
6. 'Assessment Type' – Click on the down arrow, select 'Initial Assessment'.
7. 'Priority' – Select the appropriate priority from the pick list.
8. 'Worker' – Double click to enter your own ID to initially assign the assessment to yourself, the assessment can later be reassigned to the Primary Worker for completion.

**NOTE: Do not press enter on the Keyboard as this will activate a SAVE on the record, you must click on the Grey Icon in order to bring up the worker information.**

9. 'Team' – This information should default from your ID Information, if it doesn't you will need to manually enter this information.
10. 'Start Date' – Enter the date that the Assessment started.
11. Click on the 'Save' button to add the Questionnaire to CareFirst.

**NOTE: If you select 'Cancel' before you save your questionnaire, the questionnaire will not have been created.**

## Manager to Reassign the 'Initial Assessment' to the Primary Worker

When the manager has created the Initial Assessment Questionnaire, this will have to be reassigned through CareFirst to the worker who will be responsible for undertaking the Initial Assessment. By creating the Assessment this way, CareFirst will store the assignment history for the assessment and it will also send an automatic CareFirst message to the worker to inform them that they have been re-assigned an Initial Assessment to undertake. (This does not take away the need for constant verbal communication with staff).

1. When the manager has created the questionnaire, the questionnaire will be open on screen. Please **'Save'** the Initial Assessment Questionnaire and click **'Cancel'** to exit the questionnaire.
2. From the **'Assessment Summary'** Screen; click on the **'Reassign'** button. This will take you into the **'Reassign Assessment'** Screen as shown below:-

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
1 Initial Contact	Child / Young	Soid Transfer	Childs/YP	0	16/06/2010		N	<input type="checkbox"/>
Old Initial Assessment	Child / Young	Soid Transfer	Childs/YP	0	15/06/2010		N	<input type="checkbox"/>
4 Child / Young Person's	Child / Young	Soid Transfer	Childs/YP	0	15/06/2010		N	<input type="checkbox"/>
1 Initial Contact	Child / Young	Gail Fletcher	Childs/YP	0	15/06/2010		N	<input type="checkbox"/>
3 Core Assessment	Child / Young	Soid Transfer	Childs/YP	0	10/06/2010		N	<input type="checkbox"/>
2 Initial Assessment	Child / Young	Soid Transfer	Childs/YP	0	10/06/2010		N	<input checked="" type="checkbox"/>
Case Closure / Transfer	Child / Young	Soid Transfer	Childs/YP	0	27/05/2010		N	<input type="checkbox"/>
Case Closure / Transfer	Child / Young	Soid Transfer	Childs/YP	0	27/05/2010		N	<input type="checkbox"/>

3. Click on **'Reassign'** to reassign the questionnaire to the Primary Worker who will be undertaking the assessment.

Reassign Assessment

Worker: 525305 Name: Miss Claire Louise Cabbage

Team: \* 517239 Name: East Asses & Supp (Duty) Childcare Team

Assign Date: \* 01/10/2010

Save Cancel

4. **'Worker'** - Enter the Worker ID number of the Primary Worker who will be undertaking the Initial Assessment, and click on the grey square icon to populate the Name and Team information.
5. **'Assign Date'** – Enter the date of the reassignment, double click for today's date
6. Click **'Save'**. You will receive a Message stating that notification will be sent to the new assignee.



## Primary Worker Populates the 'Initial Assessment' Questionnaire.

Questionnaires have been developed in accordance with the Professional Practise leads in line with ICS requirements and are made up from a series of questions. Answers to the questions are collected in a number of Formats:-

The Initial Assessment questionnaire has different sections which can be access by clicking on the drop down arrow and selecting a section, clicking go will take you to that section (alternatively, clicking continue will move you to the next part of the questionnaire).

Questions can be answered in different formats some are Yes/No tick boxes (N/A means question not answered), some are Pick lists, and there are also Text Boxes to record your information relating to specific questions asked.

Answer all of the relevant questions asked on the questionnaire by completing the first section, then moving through each different section, until all appropriate sections are completed.

Client Information & Questionnaire Type brought through from the previous screen.

**Score Breakdown.** →

The 'Hide Header' option will hide the information on the top half of the screen →

Questions to be completed →

**Initial Contacts prior to this assessment' – this will show any previous Consultations or Initial Contacts recorded on the child.**

**This is also a tool used by performance monitoring in which they will link the relevant contact to the initial assessment** →

→ To move to the next section of the Questionnaire, either click **continue** or click on the next tab across the top of the questionnaire, remember to save your questionnaire at regular intervals.

→ Cancelling out of the Questionnaire will not save details of any questions you have answered, if you need to come out of the questionnaire to undertake another task click the 'Save' button to save your answers.

**Answer all relevant questions in the different Sections available.**

**NOTE: (Required)** this denotes a mandatory field, if these are not completed when your manager authorises the questionnaire a message will appear informing them of the mandatory fields that still need completing and they will be unable to authorise the questionnaire

**Brown 'Hints' may also be shown to assist you in answering the question**

Contact Method (Required)  
How was the contact/referral made?

Answer: Telephone

**The next screen print will explain the 'Existing Answers' and Peek & Grab Function.**

Will show an existing answer to the Question above

What is the child's first language? (Required)

Existing Answers				Options
Start Date	End Date	Category	Notes	
18/09/2007		English		Remove from List   Edit

Add one answer only

Category: \* [dropdown]

Start Date \*: [input]

End Date: [input]

Notes: [text area]

Will allow you to edit the existing answer, with an end date/end

This will remove the answer from the questionnaire.

Clear will clear the information within the fields for you to re-enter correct information

'Add Classification' will update the Questionnaire with any information you have completed within the fields

'Peek' will check CareFirst for recent updates to this information

Add Classification Clear Peek

The yellow area will show an existing record which was entered in the main database. If someone has updated the client's basic details after the Questionnaire was created then this information will not show on the questionnaire.

Check the 'Existing Answers' to ensure these are up to date; you can also click on 'Peek' and to check will to see if anything has been updated (for this question only) following the creation of the questionnaire.

If there are no 'Existing Answers' complete the information within the fields and click on 'Add Classification' to add the classification to the questionnaire.

**Remember:** Information added in this way will not populate into the Main Database until the questionnaire has been authorised by the Manager.

**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

Any error messages shown will indicate problems with particular questions that have been answered.

**Section : Managers Actions**

This section needs to be completed by your Manager when the assessment is ready for authorisation.



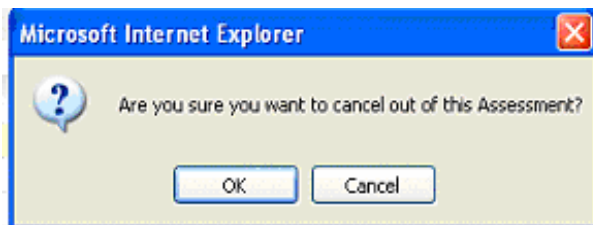
## Section: Preview All

To view this section, click on 'Preview All' from the pick list and click 'Go'. You will be shown a preview of all the sections contained within the questionnaire. The scrollbar can be used to move up and down to see all information.

After you have performed a 'Save' you have the option to carry on recording further information, or you can click 'Cancel' to leave the Questionnaire and if necessary return to it later.

**N.B:** The cancel button will only become available once the save has been performed in full by CareFirst.

**Note: You will only lose information if you have not 'saved' the questionnaire before clicking cancel. If you do cancel out of the questionnaire you will be prompted with the following message:**



Click 'OK' on this message (providing you have saved the information), you will then be returned to the Assessment Summary Screen.

**When you are satisfied that the information contained within the Questionnaire is complete and correct, the questionnaire will need reassigning to your Manager for authorisation. You should also be communicating verbally with your manager.**

**NOTE: Once Questionnaires have been authorised, they cannot be amended.**

## Saving the Questionnaire

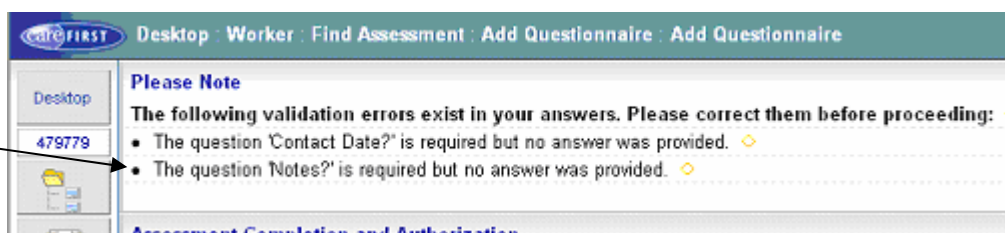
You can save the Questionnaire at any point by clicking onto the 'Save' option.



13. It is suggested that at this point you should click on 'Finish and Save'. This will take you through to the 'Assessment Completion and Authorisation' Screen you're your Manager will use to authorise the Questionnaire.

14. You will receive notification of any Mandatory fields that have not been completed, This gives you the chance to complete them before reassigning to the Manager for authorisation.

This shows the Mandatory (required) fields that have not yet been completed.





**Note: If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.**

**Any error messages shown will state the question experiencing a problem.**

17. Click '**Cancel**' –You will be returned to the previous screen.
18. Go back through the sections to correct the information.

**You have now completed the recording for the Assessment.**

**You will now need to reassign the 'Initial Assessment' to the Manager for authorisation.**

## Primary Worker to Reassign the 'Initial Assessment' to the Manager for Authorisation

In order for the Questionnaire to be completed and Authorised the Worker must reassign the Initial Assessment Questionnaire to the Manager for the Manager to Authorise. By undertaking this process of reassigning, the assessment the Manager will receive an automatic message via CareFirst informing them that the assessment has been reassigned and the Assessment will also sit in the Managers Caseload Screen. There is still a need to verbally communicate that you have done this with your Manager.

1. From the 'Assessment Summary' Screen; click on the 'Reassign' button. This will take you into the 'Reassign Assessment' Screen as shown below:-

Assessments - 1 to 8 of 97 records

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
1 Initial Contact	Child / Young	Soid Transfer	Childs/YP	0	16/06/2010		N	<input type="checkbox"/>
Old Initial Assessment	Child / Young	Soid Transfer	Childs/YP	0	15/06/2010		N	<input type="checkbox"/>
4 Child / Young Person's	Child / Young	Soid Transfer	Childs/YP	0	15/06/2010		N	<input type="checkbox"/>
1 Initial Contact	Child / Young	Gail Fletcher	Childs/YP	0	15/06/2010		N	<input type="checkbox"/>
3 Core Assessment	Child / Young	Soid Transfer	Childs/YP	0	10/06/2010		N	<input type="checkbox"/>
2 Initial Assessment	Child / Young	Soid Transfer	Childs/YP	0	10/06/2010		N	<input checked="" type="checkbox"/>
Case Closure / Transfer	Child / Young	Soid Transfer	Childs/YP	0	27/05/2010		N	<input type="checkbox"/>
Case Closure / Transfer	Child / Young	Soid Transfer	Childs/YP	0	27/05/2010		N	<input type="checkbox"/>

Buttons: File Questions, Abandon, Duplicate, **Reassign**, History, Outcome, Details

Selected record questionnaire

Will reassign the selected

2. 'Worker' – Enter the ID number of the Manager who is to authorise the Initial Assessment.

Reassign Assessment

Worker:  Name:

Team: \*  Name:

Assign Date: \*

Buttons: Save, Cancel

3. 'Team' – The team information should default from the Manager ID you have just entered, if it doesn't you will need to manually enter the Team ID.
4. 'Assign Date' – Enter date assigned to the Manager for authorisation.
5. 'Saving the Reassignment' – Click on the 'Save' button and this will prompt a message advising 'Notification will be sent to a new assignee'.



6. Click 'OK' on this message, you will then be returned to the 'Questionnaire Summary' Screen.

## Manager to Authorise the 'Initial Assessment' Questionnaire

It is the responsibility of the Manager to check CareFirst for Initial Assessments that have been reassigned for authorisation. These can be found in your Caseload screens and there will also be an automatic message which is sent upon the reassignment of this type of assessment.

1. Check within your **Own** desktop, '**Duty Manager**' desktop and other '**Team Managers**' desktops which you are covering for. (There should be reassignment messages on each desktop for Initial Assessments that have been reassigned for authorisation and the Assessment will be accessible from the '**Caseload**' screen of each desktop you access.)
2. From the '**Desktop**' view you are in click on the '**Caseload**' Icon.
3. Select the '**Initial Assessment**' Questionnaire you wish to authorise, by either clicking on the record, or placing a tick in the '**Select**' tick box – the record will turn yellow when selected.
4. Click the '**Details**' button to View & Check the Questionnaire.

Client Information & Questionnaire Type brought through from the previous screen.

Score Breakdown →

The 'Hide Header' option will hide the information on the top half of the screen →

Displayed are the different Sections (in tab format) that have to be completed as part of this Questionnaire. →

You can use the **WYSIWYG** (What You See Is What You Get) to preview the full questionnaire by clicking on the Mini Print icon in the right hand corner of the assessment block or you can select preview all.

5. When you have checked all Sections of the questionnaire go to the '**Managers Actions**' Section.

**CHECK INFORMATION IS CORRECT WITHIN THE QUESTIONNAIRE AS THE INFORMATION CANNOT BE AMENDED ONCE THE QUESTIONNAIRE HAS BEEN AUTHORISED.**

This area can be used to document any decisions from the assessment; once this is saved the 'Decision Record' will also be saved within 'Observations' as a separate Case Recording.

Assessment Delay reason must be entered

6. Record the Managers Actions by completing the relevant fields.
7. Once you have completed the Managers Actions Section click on '**Finish and Save**'. This will take you through to the 'Assessment Completion and Authorisation' Screen for you to authorise the Questionnaire.
8. At this point, you will receive notification of any Mandatory fields that have not been completed:-

This shows the Mandatory (required) fields that have not yet been completed.

9. Click '**Cancel**' to take you out of the questionnaire.

**The Manager should send a message to the worker informing them to complete the required fields in order for the questionnaire to be authorised.**

10. When all required fields have been completed, go to the '**Managers Actions**' Section and click '**Finish and Save**', the 'Assessment Completion and Authorisation' Screen will appear.

Details – this is used to record details relating to sharing data (i.e. any restrictions)

End Date – end date of questionnaire

Select 'Outcome' and 'reason code' from the list

Completed by & authorised by is the ID of the worker logged in authorising

Share Data – This can be used to record whether data recorded can be shared with external users (e.g. Health) – Function not available at present

Worker name information

This information will be populated by CareFirst when the Authorisation has been saved



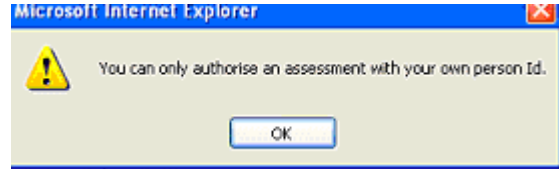
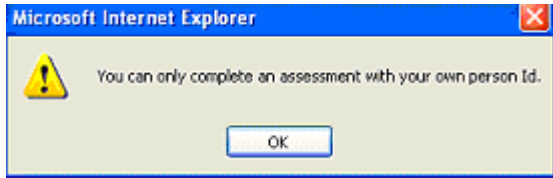
Save to proceed with the authorisation

Click cancel to abandon the authorisation

11. **'Share Data'** – Do not use.
12. **'Details'** – This refers to any details relating to data sharing – not used.
13. **'End Date'** – Please enter the end date for the questionnaire.
14. **'Priority'** – Click on the drop down arrow and select the priority.
15. **'Outcome'** – Click on the down arrow next to the 'outcome' and select the appropriate option from the list.
16. **'Reason Code'** – Click on the down arrow next to the 'reason code' and select the appropriate option from the list.
17. **'Completed By'** – Double click to enter your ID Number.
18. **'Authorised by'** – Double click to enter your ID Number.
19. **'Authorise Date & Time', 'Completed Date & Time'** and the **'Completed'** tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
20. **'Child Seen'** – If the Child has been seen click in the box.
21. **'Reason for child not seen:'** – Enter the reasons why the Child was not seen in the text box.
22. **'Allow completion without child been seen?'** – Click in the box if the child has not been seen and you want to continue to complete and authorise. N.B. You must enter a reason why the child was not seen.

23. Click '**Save**' to complete and authorise the Questionnaire.

**N.B:** If you have entered the incorrect person ID in the 'Completed by' or Authorised field then the following error messages will appear:-



24. When the save has been completed successfully the authorisation will now be complete, the Questionnaires will display in the summary screen.

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
3 Core Assessment	Child / Young	Ssid Transfer	Child/YYP High	0	24/06/2010	24/06/2010	Y	<input checked="" type="checkbox"/>
Central Duty -	Child / Young	Kelly	Child/YYP	0	07/10/2009		N	<input type="checkbox"/>
Central Duty -	Child / Young	Worker Test	Child/YYP	0	06/10/2009		N	<input type="checkbox"/>
Initial C.P.- Decisions /	Child	Debbie	Child/YYP High	0	13/08/2009		N	<input type="checkbox"/>
L.A.C Review	Child / Young	Debbie	Child/YYP High	0	13/08/2009		N	<input type="checkbox"/>
Pathway Needs Assessment	Child / Young	Debbie	Child/YYP High	0	13/07/2009		N	<input type="checkbox"/>
6 Pathway Plan	Child / Young	Debbie	Child/YYP High	0	13/07/2009		N	<input type="checkbox"/>
Old Child / Young Person's	Child / Young	Rona Swann	Child/YYP	0	02/07/2009		N	<input type="checkbox"/>

File Locations Report Abandon Duplicate Reassign History Access Outcome Details

3 Core Assessment  
Child / Young Person

Completion  
Status of

To view the authorisation details for a Questionnaire, select the record and click '**Outcome**'.



## Duty Manager to Create 'Private Fostering Arrangement Visit under Reg 8' Questionnaire

This questionnaire must be completed every time a visit is to take place. Visits under Regulation 8 should be every 6 weeks for the first year and every 12 weeks for subsequent year.

1. From the 'My Client' Screen
2. Click on the 'Find Assessments' Icon.



3. Click on the 'Add' button.



4. The 'Add Questionnaire' Screen will appear as shown below:-

5. 'Application' – This is populated automatically by CareFirst'
6. 'Questionnaire Context' – Select the context of **Child/Young Person**.
7. 'Assessment Type' – Click on the down arrow, select '**Private Fostering Arrangement (Visit Under Reg. 8)**
8. 'Priority' – Click on the down arrow, select a priority.
9. 'Worker' – Double click to show your own worker.
10. 'Team' – This information should default from your worker ID Information (if it doesn't you will need to add the team ID or search using the grey square)
11. 'Start Date' – Enter the start date of the assessment (double click to enter today's start date).
12. 'Significant in Chronology' this is populated by CareFirst, please ignore.
13. Click the 'Save' Button.

**NOTE:** If you select 'Cancel' before you 'Save' your questionnaire, the questionnaire will not be created.

## Duty Manager to Reassign the 'Private Fostering Arrangement Visit Under Reg 8' Questionnaire to the Primary Worker

When the manager has created the Private Fostering Arrangement (Visit under Regulation 8) Questionnaire, this needs to be reassigned through CareFirst to the worker who will be responsible for undertaking the assessment. By creating the assessment this way, CareFirst will store the assignment history for the assessment and it will also send an automatic CareFirst message to the worker to inform them that they have been re-assigned an assessment to undertake. (This does not take away the need for constant verbal communication with staff).

1. When the manager has created the questionnaire, the questionnaire will be open on screen. Please 'Save' the assessment questionnaire and click 'Cancel' to exit the questionnaire.
2. From the 'Assessment Summary' screen, please select the 'Private Fostering Arrangement (Visit under Regulation 8)' Questionnaire by either clicking on the record, or placing a tick in the 'Selected' box.

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input checked="" type="checkbox"/>
2 Initial Assessment	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>
Adults Complaints	Adult	Carolyn Irene	Adult	0	15/09/2010		N	<input type="checkbox"/>
Adults Complaints	Adult	Yvonne Carol	Adult	0	01/09/2010		N	<input type="checkbox"/>
B - Initial Contact	Child / Young	Ssid Transfer	Child/YP	0	04/02/2010		N	<input type="checkbox"/>

Private Fostering Arrangement (Visit Under Reg 8)  
Child / Young Person

3. Click on 'Reassign' to reassign the questionnaire to the Primary Worker who will be undertaking the assessment.

Reassign Assessment

Worker: 525305 Name: Miss Claire Louise Cabbage

Team: 517239 Name: East Asses & Supp (Duty) Childcare Team

Assign Date: 01/10/2010

Save Cancel

4. 'Worker' – Enter the Worker ID number of the Primary Worker who will be undertaking the assessment, and click on the grey square icon to populate the Name and Team information.
5. 'Assign Date' – Enter the date of the reassignment, double click for today's date
6. Click 'Save'. – You will receive a Message stating that notification will be sent to the new assignee.



**The worker will receive a CareFirst message informing them of the reassignment which will display on the worker desktop for when the worker logs in.**

## Primary Worker to Populate the 'Private Fostering Arrangement Visit Under Reg 8' Questionnaire

Questionnaires have been developed in accordance with the Professional Practise leads in line with ICS requirements.

There are different sections that form part of the Questionnaire, Answer all of the relevant questions asked on the questionnaire by completing the first section, then moving through each different section, until all appropriate sections are completed.

**Completion of this assessment should be 7 days from the date of notification.**

1. Your Manager should have created and assigned the questionnaire to you. You will be able to access this via your own **Caseload** screen or Via the Child/Young Persons **My Client** or **Assessment Summary** Screen. **Locate the assessment.**

2. Click into '**Details**' to view the Assessment – the questionnaire will appear as shown below:

The screenshot shows a web-based assessment interface. On the left, three brackets group different parts of the interface: 'Assessment Header Information' (top), 'Navigational functions' (middle), and 'Ethnicity Questions (Required field)' (bottom). The main content area displays the following information:

- Assessment Header Information:**
  - Title: Private Fostering Arrangement (Visit under Reg 8) - This assessment is assigned to Mr Ssid Transfer. 24/01/2011
  - Case ID: Miss Careplan Test P35315
  - Address: Flat B, 1, Coltman Street, KINGSTON UPON HULL, HU3 2SG
  - Telephone: 01482 123456
  - Date of Birth: 01/01/2008
  - Gender: F
  - Age: 3
  - Worker Name: Mr Ssid Transfer
  - Team Name: Information Systems Team (Headquarters)
  - Assessment Type: Private Fostering Arrangement (Visit under Reg 8)
  - Start Date: 24/01/2011
  - Score: (empty field)
- Navigational functions:**
  - Score Breakdown - 0 records found
  - Buttons: Hide Header, Cancel, Save, Continue
- Ethnicity Questions (Required field):**
  - Section: Ethnicity
  - Section ID: I.1.1: Ethnicity (Required)
  - Existing Answers table with columns: Start Date, End Date, Category, Notes, Options
  - Form fields: Category (\*), Start Date (\*), End Date, Notes

3. Use the '**Continue**' button and the '**Section List**' to navigate to other sections. **Remember to keep clicking 'Save' at regular intervals.**

**Answer all relevant questions in the different Sections available.**

**NOTE: (Required)** this denotes a mandatory field, if these are not completed when your manager authorises the questionnaire a message will appear informing them of the mandatory fields that still need completing and they will be unable to authorise the questionnaire

**Brown 'Hints' may also be shown to assist you in answering the question**

The close-up shows a question: "Contact Method (Required) How was the contact/referral made?". Below the question is a dropdown menu with "Telephone" selected. The word "Answer:" is visible to the left of the dropdown.

4. Answer the relevant questions and use the 'Continue' button and the 'Section List' to navigate to other sections. Remember to keep clicking 'Save' at regular intervals.

**Existing Answers**

Start Date	End Date	Category

Add one answer only

Category: \*

Start Date \*:

End Date:

Notes:

Africa

Asia

Canada & Usa

Caribbean Central And South America

Europe

Middle East

Oceania

Other

United Kingdom

**Section: Notification Details**

Complete the section as shown with details of the Arrangement, Carer, and Worker/Team information:

Master Questionnaire Test P56738

Address: 100 Beverley Road, KINGSTON UPON HULL, HU3 1YA

Telephone:

Date of Birth: 20/08/2005 Gender: M Age: 5

Worker Name: Mrs Patricia Anne Western Team Name: Information Systems Team (Headquarters)

Assessment Type: Private Fostering Arrangement (Visit under Reg 8)

Start Date: 27/01/2011 Score:

Score Breakdown - 0 records found

Hide Header  Cancel Save Back Continue

Questionnaire Section: Notification Details Go

2.1.1: Private Fostering

Date of Notification: \*

Date arrangement will/has commenced: \*

If the arrangement has already started and the start date is not known, the notification date can be used.

First proposed/actual private foster carer: \*    Name:  Address:

Second proposed/actual private foster carer:    Name:  Address:

The above information relating to the First Proposed/Actual Private Foster Carer, Second Proposed/Actual Private Foster Carer and allocated worker can be entered in this section if a relationship has not already been added to CareFirst. If the Relationship has been entered into CareFirst you will be able to 'Grab' the information. Follow the 'Peek and Grab' process detailed below.

Existing CareFirst Data

Miss Careplan Test has relationships

Name	Start Date	End Date	Options
P40751 : Ms Private Fostering Test	28/10/2008		Grab

Peek PR Carers

If you have already recorded these relationships click the yellow peek buttons and another screen will pop up as shown above that show the information already recorded on the Child/Young Person's record, click on grab and the information will populate into these fields.

**The next screen print will explain the 'Existing Answers' and Peek & Grab Function.**

Will show an existing answer to the Question above

Will allow you to edit the existing answer, with an end date/end reason

This will remove the answer from the questionnaire.

Clear will clear the information within the fields for you to re-enter correct information

'Add Classification' will update the Questionnaire with any information you have completed within the fields

'Peek' will check CareFirst for recent updates to this information

Information Systems Team

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Updated 28<sup>th</sup> January 2011

The yellow area will show an existing record which was entered in the main database. If someone has updated the client's basic details after the Questionnaire was created then this information will not show on the questionnaire.

Check the '**Existing Answers**' to ensure these are up to date; you can also click on 'Peek' and to check will to see if anything has been updated (for this question only) following the creation of the questionnaire.

If there are no 'Existing Answers' complete the information within the fields and click on '**Add Classification**' to add the classification to the questionnaire.

**Remember:** Information added in this way will not populate into the Main Database until the questionnaire has been authorised by the Manager.

**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

**Any error messages shown will indicate problems with particular questions that have been answered.**

### Section : Managers Actions

This section needs to be completed by your Manager when the assessment is ready for authorisation.

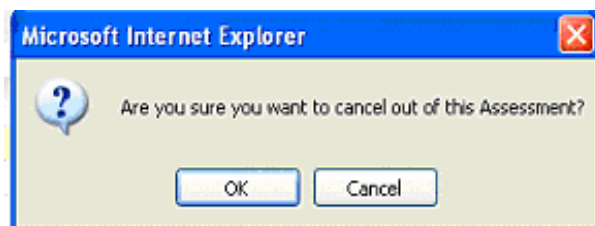
### Section: Preview All

To view this section, click on 'Preview All' from the pick list and click 'Go'. You will be shown a preview of all the sections contained within the questionnaire. The scrollbar can be used to move up and down to see all information.

After you have performed a '**Save**' you have the option to carry on recording further information, or you can click '**Cancel**' to leave the Questionnaire and if necessary return to it later.

**N.B:** The cancel button will only become available once the save has been performed in full by CareFirst.

**Note: You will only lose information if you have not 'saved' the questionnaire before clicking cancel. If you do cancel out of the questionnaire you will be prompted with the following message:**



Click '**OK**' on this message (providing you have saved the information), you will then be returned to the Assessment Summary Screen.

**When you are satisfied that the information contained within the Questionnaire is complete and correct, the questionnaire will need reassigning to your Manager for authorisation. You should also be communicating verbally with your manager.**

**NOTE: Once Questionnaires have been authorised, they cannot be amended.**

## Saving the Questionnaire

You can save the Questionnaire at any point by clicking onto the **'Save'** option.

5. It is suggested that at this point you should click on **'Finish and Save'**. This will take you through to the **'Assessment Completion and Authorisation'** Screen your Manager will use to authorise the Questionnaire.
6. You will receive notification of any Mandatory fields that have not been completed, This gives you the chance to complete them before reassigning to the Manager for authorisation.

This shows the Mandatory (required) fields that have not yet been completed.

**Note: If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.**

**Any error messages shown will state the question experiencing a problem.**

7. Click **'Cancell'** –You will be returned to the previous screen.
8. Go back through the sections to correct the information.

**You have now completed the recording for the Assessment.**

**You will now need to reassign the 'Private Fostering Arrangement' to the Manager for authorisation.**



## Primary Worker to Reassign the 'Private Fostering Arrangement Visit Under Reg 8' questionnaire to the Manager for Authorisation

In order for the Questionnaire to be completed and authorised the Worker must reassign the Questionnaire to the Manager for the Manager to Authorise. By undertaking this process of reassigning the assessment, the Manager will receive an automatic message via CareFirst informing them that the assessment has been reassigned and the Assessment will also sit in the Managers Caseload Screen. There is still a need to verbally communicate that you have done this with your Manager.

**Note:** Ensure information is correct before reassigning, once an assessment has been authorised it cannot be amended.

1. From the 'Assessment Summary' Screen; click on the 'Reassign' button. This will take you into the 'Reassign Assessment' Screen

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
N - Private Fostering	Child / Young	Pamela Smith	Child/YP Low	0	11/09/2008		N	<input checked="" type="checkbox"/>

Reassign Assessment

Worker:  Name:

Team: \*  Name:

Assign Date: \*

2. 'Worker' – Enter the ID number of the Manager who is to authorise the 'Private Fostering Arrangement (Visit Under Regulation 8)' questionnaire
3. 'Team' – The team information should default from the **Manager ID** you have just entered, if it doesn't you will need to manually enter your Team ID.
4. 'Assign Date' – Enter date assigned to the Manager for authorisation.
5. 'Saving the Reassignment' – Click on the 'Save' button and this will prompt a message advising 'Notification will be sent to a new assignee'. A CareFirst message will automatically be sent to the manager, however, always communicate verbally with your manager.
6. Click 'OK' on this message, you will then be returned to the 'Questionnaire Summary' Screen.

## Manager to Complete & Authorise the 'Private Fostering Arrangement Visit Under Reg 8' Questionnaire

The Manager will have received a message via CareFirst to inform them that a Questionnaire needs to be completed and authorised.

1. From your **Caseload**, click on the **Assessments** folder to display a list of the assessments/questionnaires you are responsible for.
2. Locate the questionnaire you wish to authorise.
3. Select the '**Private Fostering Arrangement (Visit Under Regulation 8)**' either by clicking on the record, or placing a tick in the '**Select**' tick box – the record will then turn yellow when selected.
4. Click the '**Details**' button to view the Questionnaire.

You can use the WYSIWYG (What You See Is What You Get) to preview the full questionnaire by clicking on the Mini Print icon in the right hand corner of the assessment block.

5. Read and check all information on the questionnaire, you can move to each different tab/section by either clicking '**Continue**' to move to the next Section, or click on the down arrow next to '**Section**' and select the next Section on the list, you will then need to click '**Go**' to move to that Section.

**CHECK INFORMATION IS CORRECT WITHIN THE QUESTIONNAIRE AS THE INFORMATION CANNOT BE AMENDED ONCE THE QUESTIONNAIRE HAS BEEN AUTHORISED.**

6. When you have checked all Sections of the questionnaire go to the section before 'preview all' to find the 'Finish & Save' option. Once you are happy with the decision you have made, you can click on '**Finish and Save**' button. This will take you through to the '**Assessment Completion and Authorisation**' Screen.
7. If some of the Mandatory fields have not been completed at this point, you will receive a notification; if you do you will need to Click '**Cancel**' to take you out of the questionnaire.

**Note: The Manager should send a Message informing the worker to update the required fields within the questionnaire. (Verbal communication is also essential)**

When the Questionnaire is ready to be authorised, go to the **'Managers Actions'** Section and click **'Finish and Save'** button the **'Assessment Completion and Authorisation'** Screen will appear as shown to the right.

8. **'Share Data'** – Do not use.
9. **'Details'** – Do not use.
10. **'End Date'** – Please enter the end date for the questionnaire.
11. **'Priority'** – Please select the priority from the pick list.
12. **'Outcome'** – Select the relevant option from the pick list.
13. **'Completed By'** – Enter your ID Number, double click in the field.
14. **'Authorised by'** – Enter your ID Number, double click in the field.
15. **'Authorise Date & Time'** – Tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
16. **'Child Seen'** – Tick this box if the child has been seen.
17. **'Reason for Child not Seen'** – If the child has not been seen you will need to provide reasons within this area.
18. **'Allow completion without Child being seen'** – if you are allowing the questionnaire to be authorised without the child being seen, you will be required to tick this box.
19. **'Completed Date & Time'** – Tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
20. **'Authorisation Comment'** – If necessary, a comment can be placed in this field, however, please remember that this is NOT a case recording tool.
21. Click **'Save'** to complete and authorise the Questionnaire.

**You will be returned to the previous screen. The questionnaire is now authorised.**

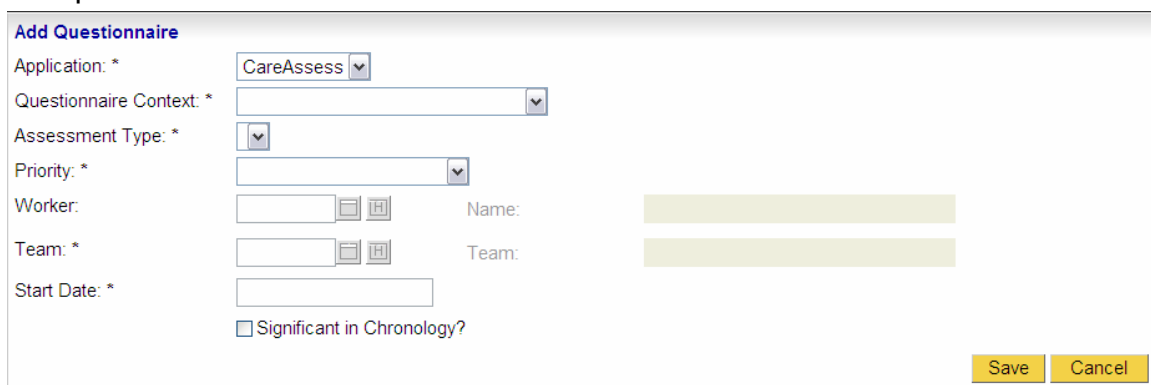
## Manager to Create a Child / Young Person's Plan

### The Child / Young Persons' Plan and the Create Private Fostering Arrangement Assessment.

The Child/YP's Plan within CareFirst has been set up so that you can pull through information you recorded in the needs section of your assessment, which will save you time and stop any duplicate recording taking place. When the plan is amended due to a change in circumstance, the plan should be ended and a new plan created. Once the new plan has been authorised by your Manager then a plan need to be created for the Primary Worker to prepare for the next review.

- From the My Client Screen, click on the 'Find Assessments' Icon, and click 'Add' to add a new questionnaire. 

- Complete the 'Add Questionnaire' Screen shown below:-



**Add Questionnaire**

Application: \* CareAssess ▾

Questionnaire Context: \* ▾

Assessment Type: \* ▾

Priority: \* ▾

Worker:    Name:

Team: \*    Team:

Start Date: \*

Significant in Chronology?

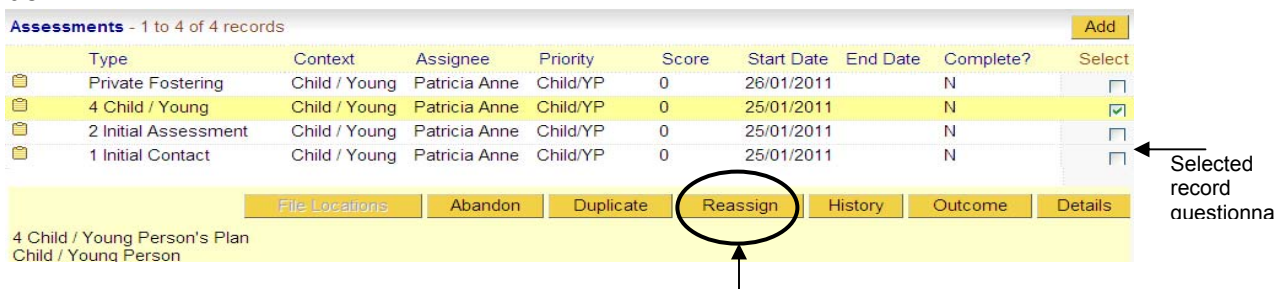
- Application** – This is populated automatically by CareFirst.
- Questionnaire Context** – Click on the down arrow, select the context of 'Child/Young Person'.
- Start Date** – Enter the date of the Child/Young Person's Plan.
- Assessment Type** – Click on the down arrow and choose "Child / Young Person's Plan".
- 'Priority'** – Select the appropriate priority from the pick list.
- 'Worker'** – Initially you will assign the Child & Young Person's Plan to yourself in order to reassign to the Primary Worker Shortly. Double click to enter your own ID.
- 'Team'** – This information should default from the Worker ID Information, if it doesn't, manually enter your own Team ID.
- Click on the 'Save' button to add the Questionnaire to CareFirst.

**(NOTE: If you select 'Cancel' before you save your questionnaire, the questionnaire will not have been created).**

## Manager to Reassign the 'Child & Young Person's Plan' to the Primary Worker

When the Manager has created the Child & Young Person's Plan Questionnaire, this will have to be reassigned through CareFirst to the worker who will be responsible for recording within the plan. By creating the Assessment this way, CareFirst will store the assignment history for the assessment and it will also send an automatic CareFirst message to the worker to inform them that they have been reassigned a Child & Young Persons' Plan. (This does not take away the need for constant verbal communication with staff).

1. When the manager has created the questionnaire, the questionnaire will be open on screen. Please **save** the Child & Young Person's Plan Questionnaire and click '**Cancel**' to exit the questionnaire.
2. From the Assessment Summary Screen, please select the Child & Young Person's Plan Questionnaire by either clicking on the record, or placing a tick in the 'Selected' box.



Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input type="checkbox"/>
4 Child / Young	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input checked="" type="checkbox"/>
2 Initial Assessment	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>
1 Initial Contact	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>

Buttons: File Locations, Abandon, Duplicate, **Reassign**, History, Outcome, Details

4 Child / Young Person's Plan  
Child / Young Person

3. Click on '**Reassign**' to reassign the questionnaire to the Primary Worker who will be populating the Plan.



**Reassign Assessment**

Worker: 525305 Name: Miss Claire Louise Cabbage

Team: \* 517239 Name: East Asses & Supp (Duty) Childcare Team

Assign Date: \* 09/11/2007

Save Cancel

4. '**Worker**' – Enter the Worker ID number of the Primary Worker who will be responsible for the Child & Young Person's Plan, and click on the grey square icon to populate the Name and Team information.
5. '**Assign Date**' – Enter the date you are reassigning the assessment (double click for today's date.)
6. Click '**Save**'.

You will receive a Message stating that notification will be sent to the new assignee



## Primary Worker to Populate the 'Child/Young Person's Plan'.

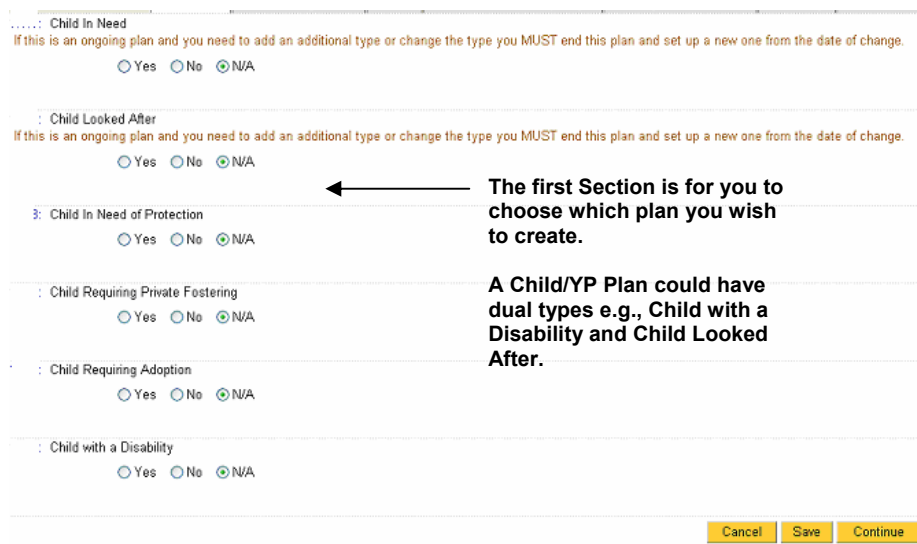
Questionnaires are developed in accordance with the Professional Practise leads in line with ICS requirements and are made up from a series of questions. Answers to the questions are collected in a number of Formats:-

Some are Yes/No tick boxes, some are Pick lists, and there are also Text Boxes to record your information relating to specific questions asked.

Answer all of the relevant questions asked on the questionnaire by completing the first section, then moving through each different section, until all appropriate sections are completed.

Remember to save your questionnaire at regular intervals.

1. **Plan Type** – The screen print below shows the 'Plan Type' screen which will be completed by the worker to determine what type of plan is being recorded, this is in the form of YES/NO/NA Option. Select 'YES' in the type of plan you are creating.



Child In Need  
If this is an ongoing plan and you need to add an additional type or change the type you MUST end this plan and set up a new one from the date of change.  
 Yes  No  N/A

Child Looked After  
If this is an ongoing plan and you need to add an additional type or change the type you MUST end this plan and set up a new one from the date of change.  
 Yes  No  N/A

3: Child In Need of Protection  
 Yes  No  N/A

Child Requiring Private Fostering  
 Yes  No  N/A

Child Requiring Adoption  
 Yes  No  N/A

Child with a Disability  
 Yes  No  N/A

Cancel Save Continue

The first Section is for you to choose which plan you wish to create.

A Child/YP Plan could have dual types e.g., Child with a Disability and Child Looked After.

To move to the next section either click 'continue' or click on the next tab across the top of the questionnaire, remember to save your questionnaire at regular intervals.

2. **Plan Management** – In this section you will be required to record details of how the plan will be managed, and when it will be reviewed.

Answer all relevant questions in the different Sections available.

**NOTE: (Required)** this denotes a mandatory field, if these are not completed when your manager authorises the questionnaire a message will appear informing them of the mandatory fields that still need completing and they will be unable to authorise the questionnaire

Brown 'Hints' may also be shown to assist you in answering the question



Contact Method (Required)  
How was the contact/referral made?  
Answer: Telephone



## The next screen print will explain the 'Existing Answers' and Peek & Grab Function.

The screenshot shows a web form titled "What is the child's first language? (Required)". It features a table of "Existing Answers" with columns for Start Date, End Date, Category, Notes, and Options. Below the table are input fields for "Add one answer only", including Category, Start Date, End Date, and Notes. At the bottom are buttons for "Add Classification", "Clear", and "Peek".

Annotations explain the functions:

- Existing Answers Table:**
  - Yellow background: "Will show an existing answer to the Questionnaire above"
  - Options column: "This will remove the answer from the questionnaire." and "Will allow you to edit the existing answer, with an end date/end"
- Buttons:**
  - Add Classification:** "'Add Classification' will update the Questionnaire with any information you have completed within the fields"
  - Clear:** "Clear will clear the information within the fields for you to re-enter correct information"
  - Peek:** "'Peek' will check CareFirst for recent updates to this information"

The yellow area will show an existing record which was entered in the main database. If someone has updated the client's basic details after the Questionnaire was created then this information will not show on the questionnaire.

Check the 'Existing Answers' to ensure these are up to date; you can also click on 'Peek' and to check will to see if anything has been updated (for this question only) following the creation of the questionnaire.

If there are no 'Existing Answers' complete the information within the fields and click on 'Add Classification' to add the classification to the questionnaire.

**Remember:** Information added in this way will not populate into the Main Database until the questionnaire has been authorised by the Manager.

**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

Any error messages shown will indicate problems with particular questions that have been answered.

### Section : Managers Actions

This section needs to be completed by your Manager when the assessment is ready for authorisation.

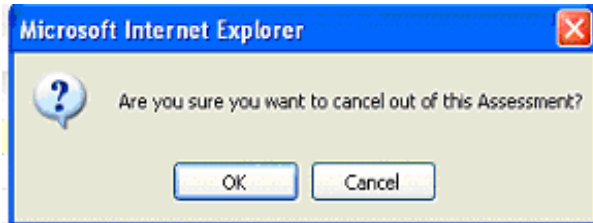
### Section: Preview All

To view this section, click on 'Preview All' from the pick list and click 'Go'. You will be shown a preview of all the sections contained within the questionnaire. The scrollbar can be used to move up and down to see all information.

After you have performed a 'Save' you have the option to carry on recording further information, or you can click 'Cancel' to leave the Questionnaire and if necessary return to it later.

**N.B:** The cancel button will only become available once the save has been performed in full by CareFirst.

**Note:** You will only lose information if you have not 'saved' the questionnaire before clicking cancel. If you do cancel out of the questionnaire you will be prompted with the following message:



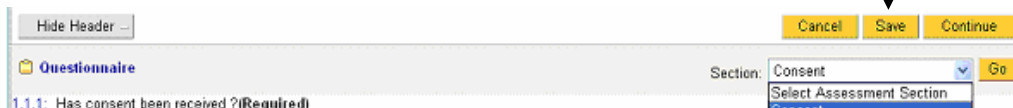
Click 'OK' on this message (providing you have saved the information), you will then be returned to the Assessment Summary Screen.

**When you are satisfied that the information contained within the Questionnaire is complete and correct, the questionnaire will need reassigning to your Manager for authorisation. You should also be communicating verbally with your manager.**

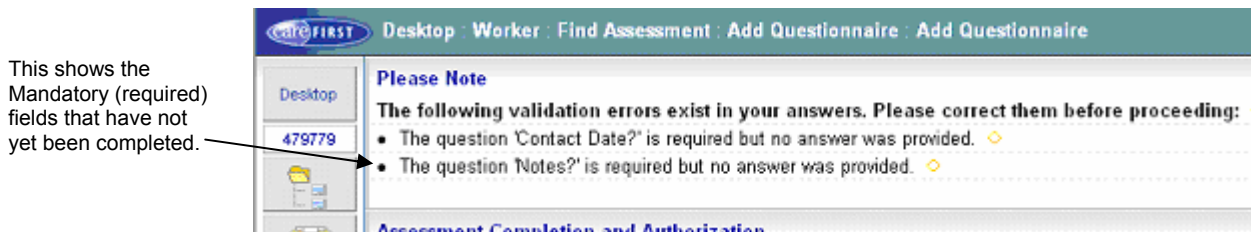
**N.B:** Once Questionnaires have been authorised, they cannot be amended.

## Saving the Questionnaire

You can save the Questionnaire at any point by clicking onto the 'Save' option.



- It is suggested that at this point you should click on 'Finish and Save'. This will take you through to the 'Assessment Completion and Authorisation' Screen your Manager will use to authorise the Questionnaire.
- You will receive notification of any Mandatory fields that have not been completed, This gives you the chance to complete them before reassigning to the Manager for authorisation.



This shows the Mandatory (required) fields that have not yet been completed.

**N.B:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

**Any error messages shown will state the question experiencing a problem.**

5. Click '**Cancel**' –You will be returned to the previous screen.
6. Go back through the sections to correct the information.

**You have now completed the recording for the Assessment.**

**You will now need to reassign the 'Child/Young Person's Plan' to the Manager for authorisation.**

## Primary Worker to Reassign the Child & Young Person's Plan to the Manager for Completion & Authorisation

When the Primary Worker has completed recording the information within the Child & Young Person's Plan Questionnaire, they are required to reassign this to the Manager who will be responsible for authorising the plan (This does not take away the need for constant verbal communication with your Manager).

- From the Assessment Summary Screen, please select the Child & Young Person's Plan Questionnaire by either clicking on the record, or placing a tick in the 'Selected' box.

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input type="checkbox"/>
4 Child / Young	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input checked="" type="checkbox"/>
2 Initial Assessment	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>
1 Initial Contact	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>

Buttons: File Locations, Abandon, Duplicate, **Reassign**, History, Outcome, Details

4 Child / Young Person's Plan  
Child / Young Person

- Click on '**Reassign**' to reassign the questionnaire to the **Manager** who will be authorising the Plan.

Reassign Assessment

Worker: 525305 Name: Miss Claire Louise Cabbage

Team: \* 517238 Name: East Asses & Supp (Duty) Childcare Team

Assign Date: \* 01/10/2010

Buttons: Save, Cancel

- '**Worker**' – Enter the Worker ID number of the Manager who will be responsible for authorising the Child & Young Person's Plan, and click on the grey square icon to populate the Name and Team information.
- '**Assign Date**' – Enter the date you are reassigning the assessment (double click for today's date.)
- Click '**Save**'.

You will receive a Message stating that notification will be sent to the new assignee.



## Manager to Authorise the Child/Young Person's Plan Questionnaire

When the Child/Young Person's plan is reviewed or amendments need to be made, or the Type of Plan changes (e.g. a Child in Need who has become a Child in Need of Protection), then the existing plan will need to be completed and authorised. The Child & Young Person's Plan will have been reassigned by the Primary Worker for them to complete their recording. The Plan will then require authorisation, it will then be reassigned back to the Manager and will show within the Managers Caseload, and you will receive an automatic message informing you of the reassignment. Once the plan has been authorised a new plan needs to be created for the Primary Worker to work on in preparation for the next review.

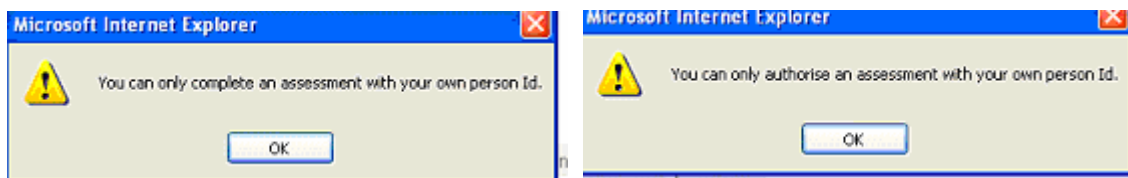
1. Check the '**Duty Manager's**' Desktop, your **own Desktop**, and the **Team Desktop** for reassignment messages, showing the assessment which has been assigned to you for authorisation.
2. Click into the '**Caseload**' Icon for the Desktop you are viewing, and locate the Child & Young Person's Plan awaiting completion and authorisation.
3. Select the Child & Young Person's Plan Questionnaire and click '**Details**' to view the assessment.
4. You can use the WYSIWYG (What You See Is What You Get) to preview the full questionnaire by clicking on the Mini Print icon in the right hand corner of the assessment block and will allow you to view the full form in the same way as preview all, alternatively, read and check all information on the questionnaire, and move to each different tab/section by either clicking '**continue**' or clicking on the different tabs along the top.
5. When you have checked all Sections of the questionnaire you can go to the '**Summary**' Section, in which a '**Finish and Save**' option will become available.
6. This will take you through to the 'Questionnaire Completion and Authorisation' Screen for you to authorise the questionnaire.
7. At this point, you will receive notification of any Mandatory fields that have not been completed (Click 'Cancel' to take you back to the questionnaire in order to complete the mandatory fields if necessary) before the questionnaire is authorised.

**CHECK INFORMATION IS CORRECT WITHIN THE QUESTIONNAIRE AS THE INFORMATION CANNOT BE AMENDED ONCE THE QUESTIONNAIRE HAS BEEN AUTHORISED.**

8. The Assessment Completion and Authorisation screen is shown below:-

9. **'Share Data'** – Ensure the radio button is set to 'No' (this function is not used).
10. **'Details'** – This refers to any details relating to data sharing – not used.
11. **'End Date'** – Please enter the end date for the questionnaire.
12. **'Priority'** – Please select the appropriate priority from the pick list.
13. **'Outcome'** – Click on the down arrow next to the 'outcome' and select the appropriate option from the list.
14. **'Reason Code'** – Click on the down arrow next to the 'reason code' and select the appropriate option from the list.
15. **'Completed By'** – Double click into the field to enter your own ID.
16. **'Completed Date & Time'** and the **'Completed'** tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
17. Click **'Save'** to complete and authorise the Questionnaire.

**N.B:** If you have entered the incorrect person ID in the **'Completed by'** and **'Authorised by'** field, an error message will appear below:-



18. When the save has been completed successfully the authorisation will now be complete, the Questionnaire will display in the summary screen.

To view the authorisation details for a Questionnaire, select the record and click **'Outcome'**.

To view the Questionnaire, select the record and click **'Details'**

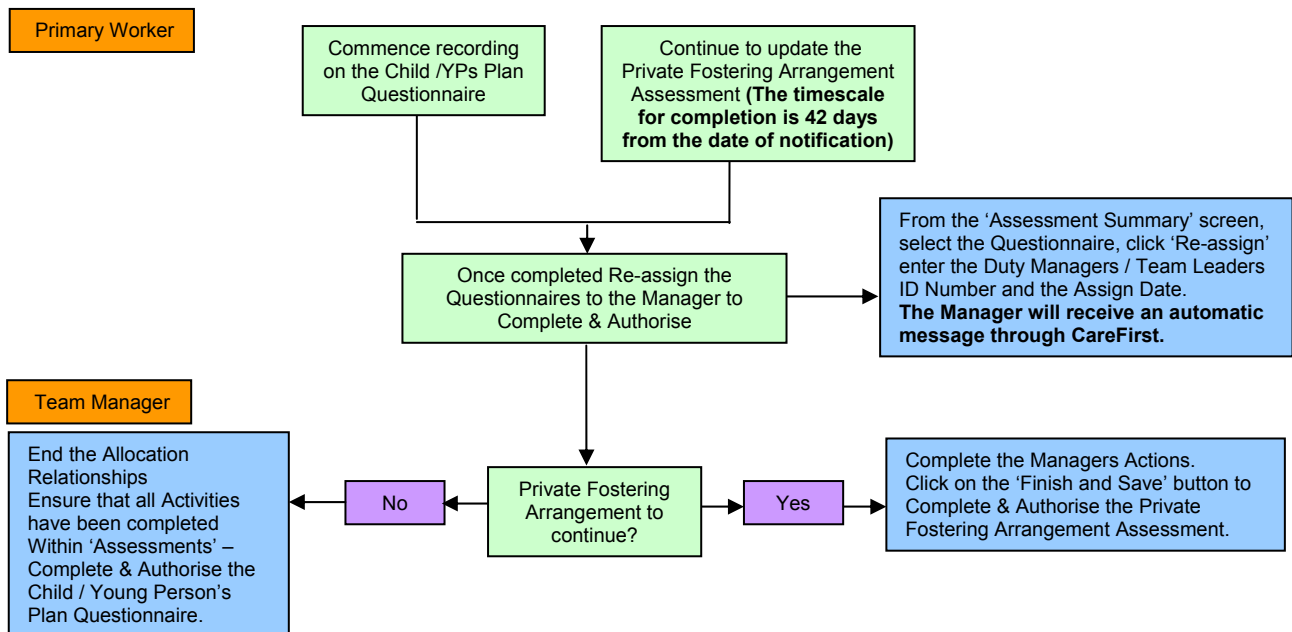


## NEXT ACTIONS:

**Plan to be Superseded:** The Manager needs to create the next questionnaire of 'Child & Young Persons Plan' following the instructions at the beginning of the Child & Young Persons Plan Section within the Manual. When the Plan is created, this can be reassigned to the worker, for the worker to populate in preparation for the next review.

**Case Closed:** When the plan is ended, a new one does not need to be created, please ensure all activities/case recordings etc are up to date. Follow the Case Closure & Transfer Process within the Manual.

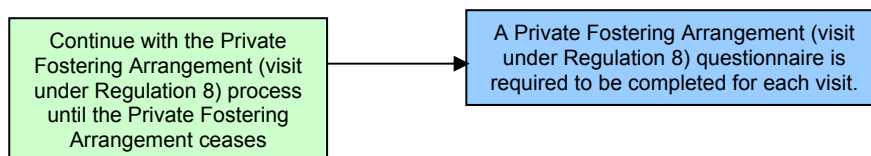
You will be at the following stage in the flowchart:



## Private Fostering Arrangement to Continue?

**NO** – You will need to end the Allocation Relationships, ensure all activities have been completed or abandoned. Ensure the Child & Young Persons Plan Questionnaire has been ended, and ensure all other recordings are up to date (e.g. case recording).

**YES** – Complete the managers Actions and authorise the Private Fostering Arrangement Assessment. Continue with the next stage in the Process...



Please refer to earlier instructions explaining how to create and populate the Private Fostering Arrangement (Visit Under Regulation 8) questionnaire.

**NOTE:** Visits under Regulation 8 should be every 6 weeks for the first year, and every 12 weeks for subsequent years.

This process will continue until the Private Fostering Arrangement ceases as shown in the flowchart.

## Duty Manager to Create 'Private Fostering Arrangement' Questionnaire

1. From the 'My Client' Screen
2. Click on the 'Find Assessments' Icon.



3. Click on the 'Add' button.



4. The 'Add Questionnaire' Screen will appear as shown below:-

5. 'Application' – This is populated automatically by CareFirst'
6. 'Questionnaire Context' – Select the context of **Child/Young Person**.
7. 'Assessment Type' – Click on the down arrow, select '**Private Fostering Arrangement**'.
8. 'Priority' – Click on the down arrow, select a priority.
9. 'Worker' – Double click to show your own worker.
10. 'Team' – This information should default from your worker ID Information (if it doesn't you will need to add the team ID or search using the grey square)
11. 'Start Date' – Enter the start date of the assessment (double click to enter today's start date).
12. 'Significant in Chronology' – This is populated by CareFirst, please ignore.
13. Click the 'Save' Button.

**NOTE:** If you select 'Cancel' before you 'Save' your questionnaire, the questionnaire will not be created.

## Duty Manager to Reassign the 'Private Fostering Arrangement' Questionnaire to the Primary Worker

When the manager has created the Private Fostering Arrangement Questionnaire, this needs to be reassigned through CareFirst to the worker who will be responsible for undertaking the assessment. By creating the assessment this way, CareFirst will store the assignment history for the assessment and it will also send an automatic CareFirst message to the worker to inform them that they have been re-assigned an assessment to undertake. (This does not take away the need for constant verbal communication with staff).

1. When the manager has created the questionnaire, the questionnaire will be open on screen. Please 'Save' the assessment questionnaire and click 'Cancel' to exit the questionnaire.
2. From the 'Assessment Summary' screen, please select the 'Private Fostering Arrangement' Questionnaire by either clicking on the record, or placing a tick in the 'Selected' box.

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input checked="" type="checkbox"/>
2 Initial Assessment	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>
Adults Complaints	Adult	Carolyn Irene	Adult	0	15/09/2010		N	<input type="checkbox"/>
Adults Complaints	Adult	Yvonne Carol	Adult	0	01/09/2010		N	<input type="checkbox"/>
B - Initial Contact	Child / Young	Ssid Transfer	Child/YP	0	04/02/2010		N	<input type="checkbox"/>

3. Click on 'Reassign' to reassign the questionnaire to the Primary Worker who will be undertaking the assessment.

4. 'Worker' – Enter the Worker ID number of the Primary Worker who will be undertaking the assessment, and click on the grey square icon to populate the Name and Team information.
5. 'Assign Date' – Enter the date of the reassignment, double click for today's date
6. Click 'Save'. – You will receive a Message stating that notification will be sent to the new assignee.



**The worker will receive a CareFirst message informing them of the reassignment which will display on the worker desktop for when the worker logs in.**

## Primary Worker to Populate the 'Private Fostering Arrangement' Questionnaire

Questionnaires have been developed in accordance with the Professional Practise leads in line with ICS requirements.

There are different sections that form part of the Questionnaire, Answer all of the relevant questions asked on the questionnaire by completing the first section, then moving through each different section, until all appropriate sections are completed.

1. Your Manager should have created and assigned the questionnaire to you. You will be able to access this via your own **Caseload** screen or Via the Child/Young Persons **My Client** or **Assessment Summary** Screen. **Locate the assessment.**

2. Click into '**Details**' to view the Assessment – the questionnaire will appear as shown below:

**Assessment Header Information**

Private Fostering Arrangement (Visit under Reg 8) - This assessment is assigned to Mr Ssid Transfer. 24/01/2011

Miss Careplan Test P35315

Address: Flat B. 1, Coltman Street, KINGSTON UPON HULL, HU3 2SG

Telephone: 01482 123456 Gender: F

Date of Birth: 01/01/2008 Age: 3

Worker Name: Mr Ssid Transfer Team Name: Information Systems Team (Headquarters)

Assessment Type: Private Fostering Arrangement (Visit under Reg 8)

Start Date: 24/01/2011 Score:

---

**Navigational functions**

Score Breakdown - 0 records found

Hide Header Cancel Save Continue

---

**Ethnicity Questions (Required field)**

Questionnaire Section: Ethnicity Go

I.1.1: Ethnicity (Required)

Existing Answers

Start Date	End Date	Category	Notes	Options
Add one answer only				
Category: *	[Dropdown]			
Start Date *	[Input]			
End Date:	[Input]			
Notes:	[Text Area]			

3. Answer the relevant questions and use the '**Continue**' button and the '**Section List**' to navigate to other sections. **Remember to keep clicking 'Save' at regular intervals.**

Existing Answers

Start Date	End Date	Category
Add one answer only		
Category: *	[Dropdown]	
Start Date *	[Input]	
End Date:	[Input]	
Notes:	[Text Area]	

Africa  
Asia  
Canada & Usa  
Caribbean Central And South America  
Europe  
Middle East  
Oceania  
Other  
United Kingdom

## Notification Details

Complete the section as shown with details of the Arrangement, Carer, and Worker/Team information:

The above information relating to the First Proposed/Actual Private Foster Carer, Second Proposed/Actual Private Foster Carer and allocated worker can be entered in this section if a relationship has not already been added to CareFirst. If the Relationship has been entered into CareFirst you will be able to 'Grab' the information. Follow the 'Peek and Grab' process detailed below.

If you have already recorded these relationships click the yellow **peek** buttons and another screen will pop up as shown above that show the information already recorded on the Child/Young Person's record, click on grab and the information will populate into these fields.

## Answer all relevant questions in the different Sections available.

**NOTE: (Required)** this denotes a mandatory field, if these are not completed when your manager authorises the questionnaire a message will appear informing them of the mandatory fields that still need completing and they will be unable to authorise the questionnaire

**Brown 'Hints' may also be shown to assist you in answering the question**

## The next screen print will explain the 'Existing Answers' and Peek & Grab Function.

The yellow area will show an existing record which was entered in the main database. If someone has updated the client's basic details after the Questionnaire was created then this information will not show on the questionnaire.

Check the '**Existing Answers**' to ensure these are up to date; you can also click on 'Peek' and to check will to see if anything has been updated (for this question only) following the creation of the questionnaire.

If there are no 'Existing Answers' complete the information within the fields and click on '**Add Classification**' to add the classification to the questionnaire.

**Remember:** Information added in this way will not populate into the Main Database until the questionnaire has been authorised by the Manager.

**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

**Any error messages shown will indicate problems with particular questions that have been answered.**

### Section : Managers Actions

This section needs to be completed by your Manager when the assessment is ready for authorisation.

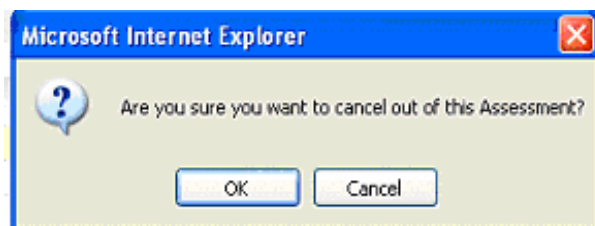
### Section: Preview All

To view this section, click on 'Preview All' from the pick list and click 'Go'. You will be shown a preview of all the sections contained within the questionnaire. The scrollbar can be used to move up and down to see all information.

After you have performed a '**Save**' you have the option to carry on recording further information, or you can click '**Cancel**' to leave the Questionnaire and if necessary return to it later.

**N.B:** The cancel button will only become available once the save has been performed in full by CareFirst.

**Note: You will only lose information if you have not 'saved' the questionnaire before clicking cancel. If you do cancel out of the questionnaire you will be prompted with the following message:**



Click '**OK**' on this message (providing you have saved the information), you will then be returned to the Assessment Summary Screen.



**When you are satisfied that the information contained within the Questionnaire is complete and correct, the questionnaire will need reassigning to your Manager for authorisation. You should also be communicating verbally with your manager.**

**NOTE: Once Questionnaires have been authorised, they cannot be amended.**

## **Saving the Questionnaire**

You can save the Questionnaire at any point by clicking onto the **'Save'** option.

4. It is suggested that at this point you should click on **'Finish and Save'**. This will take you through to the **'Assessment Completion and Authorisation'** Screen your Manager will use to authorise the Questionnaire.
5. You will receive notification of any Mandatory fields that have not been completed, This gives you the chance to complete them before reassigning to the Manager for authorisation.

This shows the Mandatory (required) fields that have not yet been completed.

**Note: If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.**

**Any error messages shown will state the question experiencing a problem.**

6. Click **'Cancel'** –You will be returned to the previous screen.
7. Go back through the sections to correct the information.

**You have now completed the recording for the Assessment.**

**You will now need to reassign the 'Private Fostering Arrangement' to the Manager for authorisation.**

## Primary Worker to Reassign the 'Private Fostering Arrangement' questionnaire to the Manager for Authorisation

In order for the Questionnaire to be completed and authorised the Worker must reassign the Questionnaire to the Manager for the Manager to Authorise. By undertaking this process of reassigning the assessment, the Manager will receive an automatic message via CareFirst informing them that the assessment has been reassigned and the Assessment will also sit in the Managers Caseload Screen. There is still a need to verbally communicate that you have done this with your Manager.

**Note:** Ensure information is correct before reassigning, once an assessment has been authorised it cannot be amended.

1. From the 'Assessment Summary' Screen; click on the 'Reassign' button.

Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input checked="" type="checkbox"/>
2 Initial Assessment	Child / Young	Patricia Anne	Child/YP	0	25/01/2011		N	<input type="checkbox"/>
Adults Complaints	Adult	Carolyn Irene	Adult	0	15/09/2010		N	<input type="checkbox"/>
Adults Complaints	Adult	Yvonne Carol	Adult	0	01/09/2010		N	<input type="checkbox"/>
B - Initial Contact	Child / Young	Ssid Transfer	Child/YP	0	04/02/2010		N	<input type="checkbox"/>

Buttons: File Locations, Abandon, Duplicate, **Reassign**, History, Outcome, Details

Private Fostering Arrangement (Visit Under Reg 8)  
Child / Young Person

2. This will take you into the 'Reassign Assessment' Screen.

**Reassign Assessment**

Worker: 525305 Name: Miss Claire Louise Cabbage

Team: \* 517239 Name: East Asses & Supp (Duty) Childcare Team

Assign Date: \* 16/11/2007

Buttons: Save, Cancel

3. 'Worker' – Enter the ID number of the Manager who is to authorise the 'Private Fostering Arrangement' questionnaire
2. 'Team' – The team information should default from the **Manager ID** you have just entered, if it doesn't you will need to manually enter your Team ID.
3. 'Assign Date' – Enter date assigned to the Manager for authorisation.
4. 'Saving the Reassignment' – Click on the 'Save' button and this will prompt a message advising 'Notification will be sent to a new assignee'. A CareFirst message will automatically be sent to the manager, however, always communicate verbally with your manager.
5. Click 'OK' on this message, you will then be returned to the 'Questionnaire Summary' Screen.

## Manager to Complete & Authorise the 'Private Fostering Arrangement' Questionnaire

The Manager will have received a message via CareFirst to inform them that a Questionnaire needs to be completed and authorised.

1. From your **Caseload**, click on the **Assessments** folder to display a list of the assessments/questionnaires you are responsible for.
2. Locate the questionnaire you wish to authorise.
3. Select the '**Private Fostering Arrangement**' either by clicking on the record, or placing a tick in the '**Select**' tick box – the record will then turn yellow when selected.
4. Click the '**Details**' button to view the Questionnaire.

You can use the WYSIWYG (What You See Is What You Get) to preview the full questionnaire by clicking on the Mini Print icon in the right hand corner of the assessment block.

5. Read and check all information on the questionnaire, you can move to each different tab/section by either clicking '**Continue**' to move to the next Section, or click on the down arrow next to '**Section**' and select the next Section on the list, you will then need to click '**Go**' to move to that Section.

**CHECK INFORMATION IS CORRECT WITHIN THE QUESTIONNAIRE AS THE INFORMATION CANNOT BE AMENDED ONCE THE QUESTIONNAIRE HAS BEEN AUTHORISED.**

6. When you have checked all Sections of the questionnaire go to the section before 'preview all' to find the 'Finish & Save' option. Once you are happy with the decision you have made, you can click on '**Finish and Save**' button. This will take you through to the '**Assessment Completion and Authorisation**' Screen.
7. If some of the Mandatory fields have not been completed at this point, you will receive a notification; if you do you will need to Click '**Cancel**' to take you out of the questionnaire.

**Note: The Manager should send a Message informing the worker to update the required fields within the questionnaire. (Verbal communication is also essential)**

When the Questionnaire is ready to be authorised, go to the **'Managers Actions'** Section and click **'Finish and Save'** button the **'Assessment Completion and Authorisation'** Screen will appear as shown to the right.

8. **'Share Data'** – Do not use.
9. **'Details'** – Do not use.
10. **'End Date'** – Please enter the end date for the questionnaire.
11. **'Priority'** – Please select the priority from the pick list.
12. **'Outcome'** – Select the relevant option from the pick list.
13. **'Completed By'** – Enter your ID Number, double click in the field.
14. **'Authorised by'** – Enter your ID Number, double click in the field.
15. **'Authorise Date & Time'** – Tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
16. **'Child Seen'** – Tick this box if the child has been seen.
17. **'Reason for Child not Seen'** - If the child has not been seen you will need to provide reasons within this area.
18. **'Allow completion without Child being seen'** – If you are allowing the questionnaire to be authorised without the child being seen, you will be required to tick this box.
19. **'Completed Date & Time'** – Tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
20. **'Authorisation Comment'** – If necessary, a comment can be placed in this field, however, please remember that this is NOT a case recording tool.
21. Click **'Save'** to complete and authorise the Questionnaire.

**You will be returned to the previous screen. The questionnaire is now authorised.**

# How to record information on the Child Record when the Private Foster Carer Moves to another Local Authority with the Child

## Change of Address

You will need to change the address details Private Foster Carer's record.

You are also required to change the address details on the Child's record and the create the Questionnaire - Private Foster Carer Moved to other LA.

## How to change the address details on the Private Foster Carers Record

1. From the 'Personal Details' screen, click once on the 'Address Details' folder to open it.
2. Click on the 'Add Main' button to open the 'Find Location' screen.

3. It is advisable to search by one of the following: -

Search by Street name only – enter part of street name and remember to use the wildcard % (percentage sign).

Search by Street name and Town only – enter part of street name and a wildcard % and part of town and a wildcard % **Note: Town is 'Kingston upon Hull'**

Search by the full Postcode only

4. Click on the 'Search' button and the search results will appear at the bottom of the screen as shown below: -

Short Address	Post Code	No. or Range	NLPG?	Select
Strand Close, Kingston Upon Hull	HU2 9DB	200	No	<input type="checkbox"/>
Strand Close, Kingston Upon Hull	HU2 9DB	220	No	<input type="checkbox"/>
Strand Close, Kingston Upon Hull	HU2 9DB	300	No	<input type="checkbox"/>
Brunswick House, Strand Close, Kingston Upon Hull	HU2 9DB	No	No	<input type="checkbox"/>
Brunswick House, Strand Close, Kingston Upon Hull	HU2 9DB	No	Yes	<input type="checkbox"/>

5. Highlight the appropriate address by clicking in the 'Select' box and click on the 'Use Selected' button to bring the address back. **If there is more than one address the same select the one that has the NLPG (National Land and Property Gazetteer) marked as 'Yes'.** Go to step 7.

If no match is found because it is a new address, then search again using 'cannot find%' in the 'Street Name' field.

6. Click on the **'Search'** button and select the **'Cannot Find Address'** by clicking in the appropriate **'Select'** box and click on the **'Use Selected'** button to bring the address back. Type the correct address within the **'Notes'** field. The Information Systems Team run a report on **'Cannot Find Addresses'** and will create the appropriate address and add it to CareFirst. The person's address details will automatically be updated at this point.
7. You can enter a flat number or room number if required.

8. **'Start Date'** – Enter the start date of the address.
9. **'Notes'** – Field, enter relevant free text if required. If you have selected the 'Cannot Find Address' you must enter the full address details and postcode of the address you cannot find within this field.
10. **'Type'** – Click on the drop down arrow and select the type of address.
11. **'Accomm Type'** – Field, click on the drop down arrow and select the appropriate accommodation type.
12. **'Tenure Type'** – Field, click on the drop down arrow and select as appropriate.
13. **'Household Composition'** – Field, click on the drop down arrow and select as appropriate.

***The 'Type', 'Accomm Type', 'Tenure Type' and 'Household Composition' fields are particularly important when the Occupational Therapy Team become involved with an Adult or Child/Young Person when they are required to make adaptations to a property or provide pieces of equipment.***

14. Click on the **'Save'** button. This will take you back to the **'Personal Details'** screen showing the updated address information.

## **How to change the address details on the Child/young Person's Record**

Follow steps 1 – 14 on the previous two pages. You are then required to create the questionnaire Private Foster Carer moved to other LA. See instruction on the next page:-



## How to Create the Questionnaire – Private Foster Carer moved to other LA.

This questionnaire must be completed if a Foster Carer Moves into the area of another Local Authority.

1. From the 'My Client' Screen

2. Click on the 'Find Assessments' Icon.



3. Click on the 'Add' button.



4. The 'Add Questionnaire' Screen will appear as shown below:-

5. 'Application' – This is populated automatically by CareFirst.

6. 'Questionnaire Context' – Select the context of **Child/Young Person**.

7. 'Assessment Type' – Click on the down arrow, select **Private Foster Carer moved to other LA**.

8. 'Priority' – Click on the down arrow, select a priority.

9. 'Worker' – Double click to show your own worker.

10. 'Team' – This information should default from your worker ID Information (if it doesn't you will need to add the team ID or search using the grey square).

11. 'Start Date' – Enter the start date of the assessment (double click to enter today's start date).

12. 'Significant in Chronology' – This is populated by CareFirst, please ignore.

13. Click the 'Save' Button.

**N.B:** If you select 'Cancel' before you 'Save' your questionnaire, the questionnaire will not be created.

## How to Populate the Questionnaire 'Private Foster Carer moved to other LA'

Questionnaires have been developed in accordance with the Professional Practise leads in line with ICS requirements.

There are different sections that form part of the Questionnaire, Answer all of the relevant questions asked on the questionnaire by completing the first section, then moving through each different section, until all the appropriate sections have been completed.

The screenshot shows a web-based assessment form. At the top, it displays 'Desktop : MyClient : Find Assessment : Assessments' and 'Session Time Remaining: 03:59'. The main title is 'Q - Private Foster Carer move to OLA' with a date of '26/09/2008'. Below this is a section for 'Miss Sam Test P28443' with various fields: Address (81 Beverley Road, KINGSTON UPON HULL, HU3 1XR), Telephone, Gender (F), Date of Birth (01/01/1998), Age (10), Worker Name (Mr Ssid Transfer), Team Name (Information Systems Team (Headquarters)), Assessment Type (Q - Private Foster Carer move to OLA), Start Date (26/09/2008), and Score. A 'Score Breakdown' section shows '0 records found'. Below the header information are navigation buttons: 'Hide Header', 'Cancel', 'Save', and 'Finish and Save'. The 'Questionnaire' section is active, showing question '1.1.1: Date of Change of Address:(Required)' with an empty text box, and '1.1.2: New Address:(Required)' with a larger text area. Brackets on the left side of the screenshot label these sections as 'Assessment Header Information', 'Navigation Functions', and 'Assessment Questions and Answers'.

**NB:** Remember after you have answered the questions particularly the text box ones where you can input a lot of information to keep clicking 'Save' at regular intervals.

Answer all relevant questions in the different Sections available.

**NOTE:** (Required) this denotes a mandatory field, if these are not completed when your manager authorises the questionnaire a message will appear informing them of the mandatory fields that still need completing and they will be unable to authorise the questionnaire

Brown 'Hints' may also be shown to assist you in answering the question

The close-up shows a question: 'Contact Method (Required)' with a hint below it: 'How was the contact/referral made?'. The answer field is a dropdown menu currently showing 'Telephone'.

## The next screen print will explain the 'Existing Answers' and Peek & Grab Function.

The screenshot shows a form titled "What is the child's first language? (Required)". Below the title is a table of "Existing Answers".

Start Date	End Date	Category	Notes	Options
18/09/2007		English		Remove from List   Edit

Below the table are input fields for "Add one answer only", including "Category: \*", "Start Date \*", "End Date", and "Notes".

Annotations:

- "Will show an existing answer to the Question above" points to the table row.
- "This will remove the answer from the questionnaire." points to the "Remove from List" button.
- "Will allow you to edit the existing answer, with an end date/end" points to the "Edit" button.
- "Clear will clear the information within the fields for you to re-enter correct information" points to the "Clear" button.
- "'Peek' will check CareFirst for recent updates to this information" points to the "Peek" button.
- "'Add Classification' will update the Questionnaire with any information you have completed within the fields" points to the "Add Classification" button.

The yellow area will show an existing record which was entered in the main database. If someone has updated the client's basic details after the Questionnaire was created then this information will not show on the questionnaire.

Check the 'Existing Answers' to ensure these are up to date; you can also click on 'Peek' and to check will to see if anything has been updated (for this question only) following the creation of the questionnaire.

If there are no 'Existing Answers' complete the information within the fields and click on 'Add Classification' to add the classification to the questionnaire.

**Remember:** Information added in this way will not populate into the Main Database until the questionnaire has been authorised by the Manager.

**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

Any error messages shown will indicate problems with particular questions that have been answered.

### Section : Managers Actions

This section needs to be completed by your Manager when the assessment is ready for authorisation.

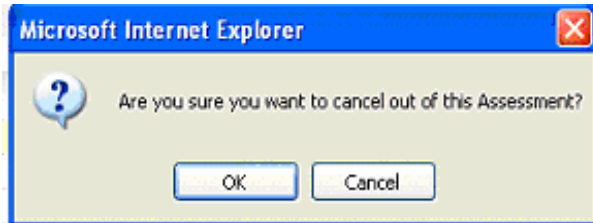
### Section: Preview All

To view this section, click on 'Preview All' from the pick list and click 'Go'. You will be shown a preview of all the sections contained within the questionnaire. The scrollbar can be used to move up and down to see all information.

After you have performed a 'Save' you have the option to carry on recording further information, or you can click 'Cancel' to leave the Questionnaire and if necessary return to it later.

**N.B:** The cancel button will only become available once the save has been performed in full by CareFirst.

**Note:** You will only lose information if you have not 'saved' the questionnaire before clicking cancel. If you do cancel out of the questionnaire you will be prompted with the following message:



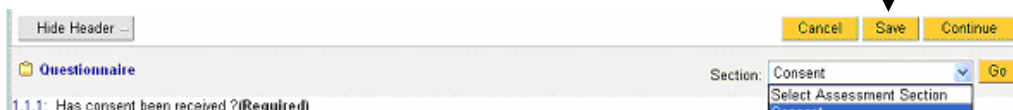
Click 'OK' on this message (providing you have saved the information), you will then be returned to the Assessment Summary Screen.

**When you are satisfied that the information contained within the Questionnaire is complete and correct, the questionnaire will need reassigning to your Manager for authorisation. You should also be communicating verbally with your manager.**

**NOTE:** Once Questionnaires have been authorised, they cannot be amended.

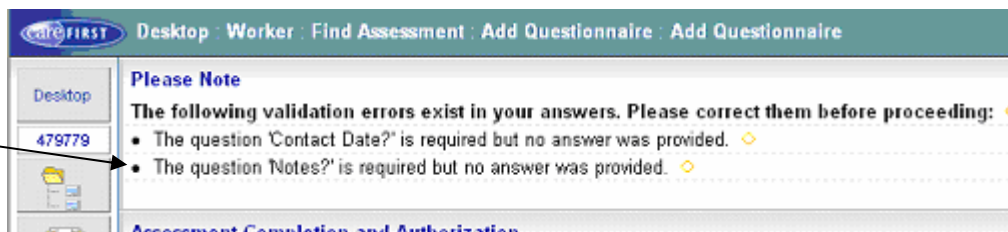
## Saving the Questionnaire

You can save the Questionnaire at any point by clicking onto the 'Save' option.



1. It is suggested that at this point you should click on 'Finish and Save'. This will take you through to the 'Assessment Completion and Authorisation' Screen your Manager will use to authorise the Questionnaire.
2. You will receive notification of any Mandatory fields that have not been completed, This gives you the chance to complete them before reassigning to the Manager for authorisation.

This shows the Mandatory (required) fields that have not yet been completed.



**N.B:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

Any error messages shown will state the question experiencing a problem.

3. Click '**Cancel**' –You will be returned to the previous screen.
4. Go back through the sections to correct the information.

**You have now completed the recording for the Assessment.**

**You will now need to reassign the 'Private Foster Carer moved to other LA' to the Manager for authorisation.**

## How to record information on the Child Record when the Private Fostering Arrangement is to Terminate

### How to Create the Questionnaire – Terminate Private Fostering Arrangement.

This questionnaire must be completed if the Private Fostering Arrangement is to Terminate.

1. From the 'My Client' Screen

2. Click on the 'Find Assessments' Icon.



3. Click on the 'Add' button.

Add

4. The 'Add Questionnaire' Screen will appear as shown below:-

5. 'Application' – This is populated automatically by CareFirst.

6. 'Questionnaire Context' – Select the context of **Child/Young Person**.

7. 'Assessment Type' – Click on the down arrow, select **Terminate Private Fostering Arrangement**.

8. 'Priority' – Click on the down arrow, select a priority.

9. 'Worker' – Double click to show your own worker.

10. 'Team' – This information should default from your worker ID Information (if it doesn't you will need to add the team ID or search using the grey square).

11. 'Start Date' – Enter the date of the Arrangement will Terminate (double click to enter today's start date).

12. 'Significant in Chronology' – This is populated automatically by CareFirst, please ignore.

13. Click the 'Save' Button.

**N.B: If you select 'Cancel' before you 'Save' your questionnaire, the questionnaire will not be created.**



## How to Populate the Questionnaire 'Terminate Private Fostering Arrangement'.

Questionnaires have been developed in accordance with the Professional Practise leads in line with ICS requirements.

There are different sections that form part of the Questionnaire, Answer all of the relevant questions asked on the questionnaire by completing the first section, then moving through each different section, until all the appropriate sections have been completed.

Desktop : MyClient - Find Assessment : Assessments Session Time Remaining: 03:37

**R - Terminate Private Fostering Arrangement** 26/09/2008

**Miss Sam Test** P20443

Address: 81 Beverley Road, KINGSTON UPON HULL, HU3 1XR

Telephone:  Gender: F

Date of Birth: 01/01/1998 Age: 10

Worker Name: Mr Ssid Transfer Team Name: Information Systems Team (Headquarters)

Assessment Type: R - Terminate Private Fostering Arrangement

Start Date: 26/09/2008 Score:

Score Breakdown - 0 records found

Hide Header ... Cancel Save Finish and Save

**Questionnaire** Details Preview All

1.1.1: Date of Notification that Private Fostering Arrangement has ended: (Required)

Answer:

1.1.2: Name of Person giving Notification: (Required)

Answer:

**N.B:** Remember after you have answered the questions particularly the text box ones where you can input a lot of information to keep clicking 'Save' at regular intervals.

Answer all relevant questions in the different Sections available.

**NOTE:** (Required) this denotes a mandatory field, if these are not completed when your manager authorises the questionnaire a message will appear informing them of the mandatory fields that still need completing and they will be unable to authorise the questionnaire

Brown 'Hints' may also be shown to assist you in answering the question

Contact Method (Required)

How was the contact/referral made?

Answer:

## The next screen print will explain the 'Existing Answers' and Peek & Grab Function.

The screenshot shows a questionnaire titled "What is the child's first language? (Required)". It features an "Existing Answers" table with columns for Start Date, End Date, Category, Notes, and Options. A yellow row shows an existing answer: Start Date: 18/09/2007, End Date: (blank), Category: English, Notes: (blank), Options: Remove from List | Edit. Below the table are input fields for "Add one answer only", including Category, Start Date, End Date, and Notes. At the bottom are three buttons: "Add Classification", "Clear", and "Peek".

Annotations:

- "Will show an existing answer to the Question above" points to the yellow row in the table.
- "This will remove the answer from the questionnaire." points to the "Remove from List" link.
- "Will allow you to edit the existing answer, with an end date/end" points to the "Edit" link.
- "Clear will clear the information within the fields for you to re-enter correct information" points to the "Clear" button.
- "'Add Classification' will update the Questionnaire with any information you have completed within the fields" points to the "Add Classification" button.
- "'Peek' will check CareFirst for recent updates to this information" points to the "Peek" button.

The yellow area will show an existing record which was entered in the main database. If someone has updated the client's basic details after the Questionnaire was created then this information will not show on the questionnaire.

Check the 'Existing Answers' to ensure these are up to date; you can also click on 'Peek' and to check will to see if anything has been updated (for this question only) following the creation of the questionnaire.

If there are no 'Existing Answers' complete the information within the fields and click on 'Add Classification' to add the classification to the questionnaire.

**Remember:** Information added in this way will not populate into the Main Database until the questionnaire has been authorised by the Manager.

**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

Any error messages shown will indicate problems with particular questions that have been answered.

### Section : Managers Actions

This section needs to be completed by your Manager when the assessment is ready for authorisation.

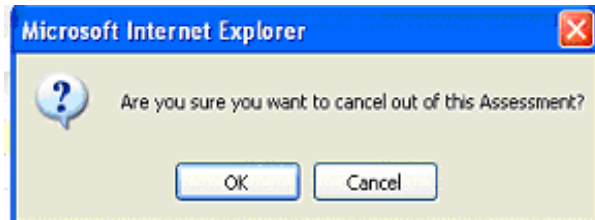
### Section: Preview All

To view this section, click on 'Preview All' from the pick list and click 'Go'. You will be shown a preview of all the sections contained within the questionnaire. The scrollbar can be used to move up and down to see all information.

After you have performed a 'Save' you have the option to carry on recording further information, or you can click 'Cancel' to leave the Questionnaire and if necessary return to it later.

**N.B:** The cancel button will only become available once the save has been performed in full by CareFirst.

**Note:** You will only lose information if you have not 'saved' the questionnaire before clicking cancel. If you do cancel out of the questionnaire you will be prompted with the following message:



Click 'OK' on this message (providing you have saved the information), you will then be returned to the Assessment Summary Screen.

**When you are satisfied that the information contained within the Questionnaire is complete and correct, the questionnaire will need reassigning to your Manager for authorisation. You should also be communicating verbally with your manager.**

**NOTE:** Once Questionnaires have been authorised, they cannot be amended.

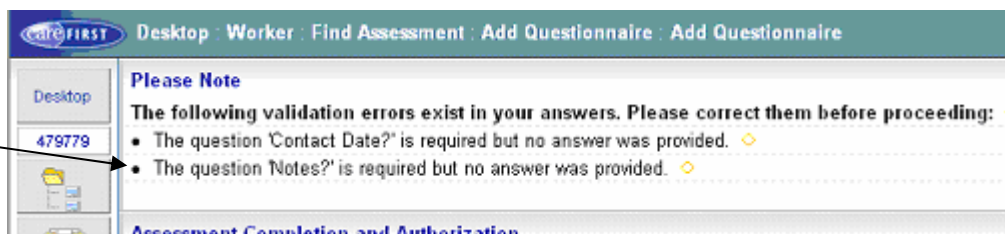
## Saving the Questionnaire

You can save the Questionnaire at any point by clicking onto the 'Save' option.



1. It is suggested that at this point you should click on 'Finish and Save'. This will take you through to the 'Assessment Completion and Authorisation' Screen your Manager will use to authorise the Questionnaire.
2. You will receive notification of any Mandatory fields that have not been completed, This gives you the chance to complete them before reassigning to the Manager for authorisation.

This shows the Mandatory (required) fields that have not yet been completed.



**Note:** If information with these questions conflict, you may get an error message when trying to continue to the next section, examples of which are when an existing answer is already recorded, and a worker has tried to partly add another one. Or, if a 'Peek' has been performed and the information has not been grabbed etc.

**Any error messages shown will state the question experiencing a problem.**

3. Click '**Cancel**' –You will be returned to the previous screen.
4. Go back through the sections to correct the information.

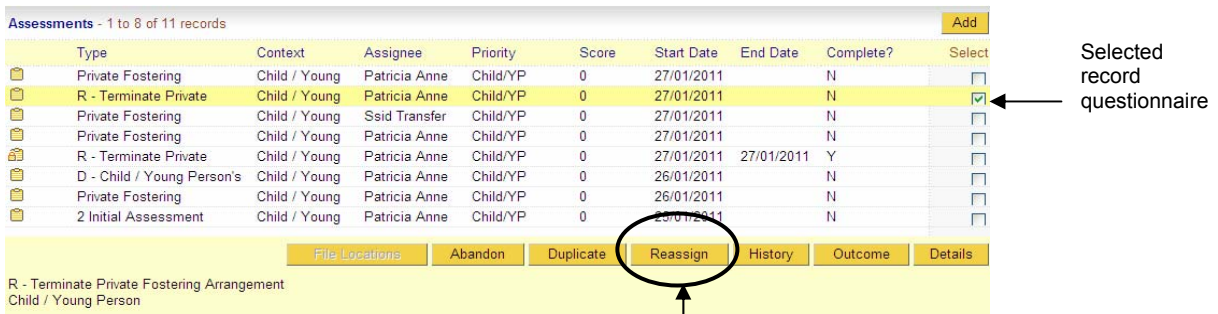
**You have now completed the recording for the Assessment.**

**You will now need to reassign the 'Terminate Private Fostering Arrangement' to the Manager for authorisation.**

## Primary Worker to Reassign the 'Terminate Private Fostering Arrangement'. to the Manager for Completion & Authorisation

When the Primary Worker has completed recording the information within the Child & Young Person's Plan Questionnaire, they are required to reassign this to the Manager who will be responsible for authorising the plan (This does not take away the need for constant verbal communication with your Manager).

- From the Assessment Summary Screen, please select the Child & Young Person's Plan Questionnaire by either clicking on the record, or placing a tick in the 'Selected' box.



Type	Context	Assignee	Priority	Score	Start Date	End Date	Complete?	Select
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	27/01/2011		N	<input type="checkbox"/>
R - Terminate Private	Child / Young	Patricia Anne	Child/YP	0	27/01/2011		N	<input checked="" type="checkbox"/>
Private Fostering	Child / Young	Ssid Transfer	Child/YP	0	27/01/2011		N	<input type="checkbox"/>
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	27/01/2011		N	<input type="checkbox"/>
R - Terminate Private	Child / Young	Patricia Anne	Child/YP	0	27/01/2011	27/01/2011	Y	<input type="checkbox"/>
D - Child / Young Person's	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input type="checkbox"/>
Private Fostering	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input type="checkbox"/>
2 Initial Assessment	Child / Young	Patricia Anne	Child/YP	0	26/01/2011		N	<input type="checkbox"/>

- Click on 'Reassign' to reassign the questionnaire to the Manager who will be authorising the Plan.



- 'Worker' – Enter the Worker ID number of the Manager who will be responsible for authorising the Child & Young Person's Plan, and click on the grey square icon to populate the Name and Team information.
- 'Assign Date' – Enter the date you are reassigning the assessment (double click for today's date.)
- Click 'Save'.

You will receive a Message stating that notification will be sent to the new assignee.



## Manager to Complete & Authorise 'Terminate Private Fostering Arrangement' Questionnaire

**CHECK INFORMATION IS CORRECT WITHIN THE QUESTIONNAIRE AS THE INFORMATION CANNOT BE AMENDED ONCE THE QUESTIONNAIRE HAS BEEN AUTHORISED.**

4. 'Share Data' – Do not use.
5. 'Details' – Do not use.
6. 'End Date' – Please enter the end date for the questionnaire.
7. 'Priority' – Please select the priority from the pick list.
8. 'Outcome' – Select **Private Foster Carer Moved to other LA**.
9. 'Completed By' – Enter your ID Number, double click in the field.
10. 'Authorised by' – Enter your ID Number, double click in the field.
11. 'Authorise Date & Time' – Tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
12. 'Completed Date & Time' – Tick box will automatically be filled in by CareFirst when the Authorisation is complete and the record is saved.
13. 'Authorisation Comment' – If necessary, a comment can be placed in this field, however, please remember that this is NOT a case recording tool.
14. Click 'Save' to complete and authorise the Questionnaire.

**You will be returned to the previous screen.  
The questionnaire is now authorised.**



## Terminate the Private Fostering Placement in the Maintain Private Fostering Screen.

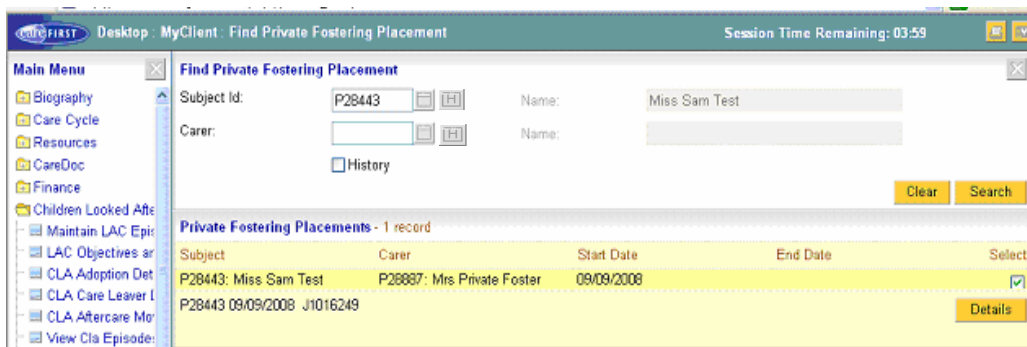
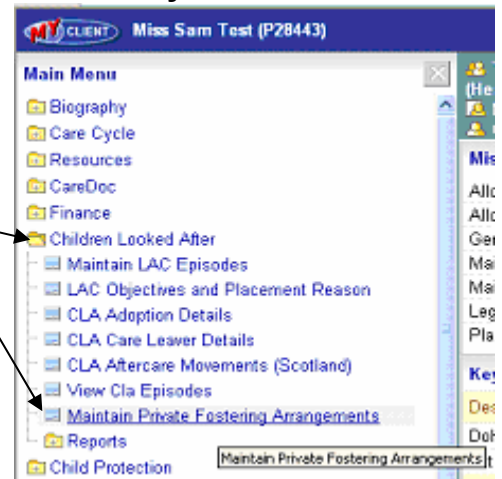
A new screen has been introduced to look at a summary of current/historically ended and historically cancelled the private fostering placements that a Child/Young Person could have been in. You are required to create a Terminate Private Fostering Arrangement Questionnaire and end the placement via the Maintain Private Fostering Placements screen follow the instruction below:-

1. Search for your Child/Young Person and bring them back to the **'My Client'** screen.

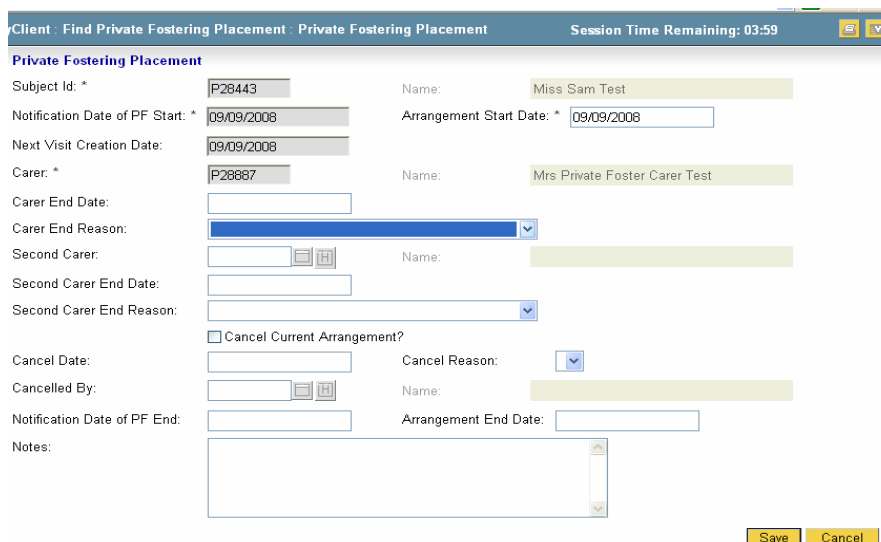
2. Click on the **'Main Menu'** icon on the left hand side.

3. Click on the folder **'Children Looked After'** to open it.

4. Double click to select the option **'Maintain Private Fostering Arrangements'** to open the **Find Private Fostering Placement** screen as shown below:-



5. Highlight the placement you want to end and click on the **Details** button to open the **Private Fostering Placement** screen.



6. **'Subject ID'** – Defaults in automatically when you have already selected your client in the **My Client** screen.
7. **'Notification of PF Start'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
8. **'Arrangement Start Date'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
9. **'Next Visit Creation Date'** – This is the date you created your activity to remind you to do the next visit this can be created within the questionnaire.
10. **'Carer'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
11. **'Carer End Date'** – Enter the date the Child/young Person ceased to live with the Private Foster Carer.
12. **'Carer End Reason'** – Click on the drop down arrow and enter the appropriate end reason.

**You only need to complete this information if there was a second carer as part of this arrangement.**

13. **'Second Carer'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
14. **'Second Carer End Date'** – Enter the date the Child/young Person ceased to live with the Private Foster Carer.
15. **'Second Carer End Reason'** – Click on the drop down arrow and enter the appropriate end reason.

**NB: Please follow separate instructions for cancelling a Private Fostering Arrangement that had not commenced.**

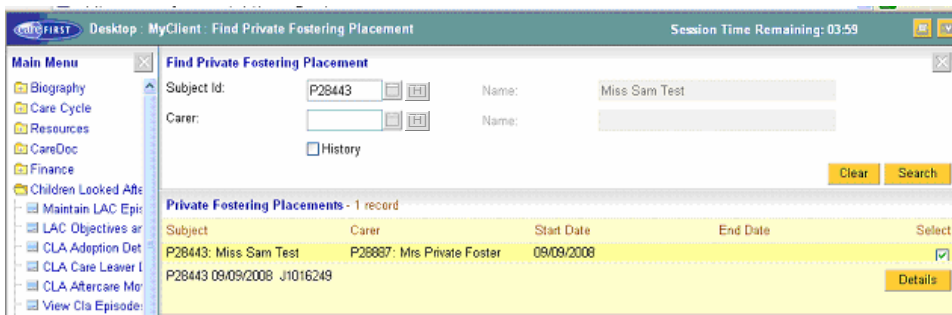
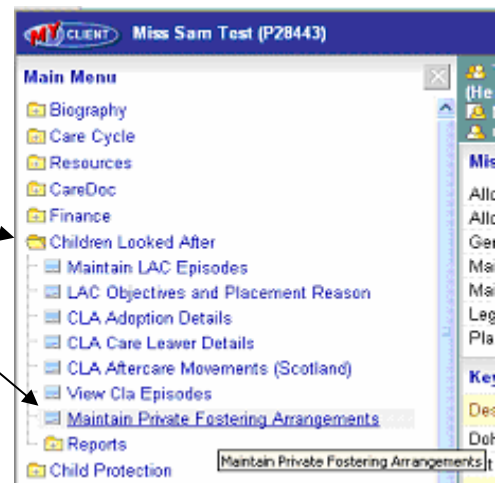
16. **'Notification Date of Private Fostering End'** – Enter the date you were notified that the Private Fostering Arrangement was to end.
17. **'Arrangement End Date'** – Enter the date the Arrangement has ended
18. **'Notes'** – You can enter any relevant notes at this point if appropriate. **N.B.** Underneath the text box it will display how many characters remain before you are unable to record any further information.
19. When you are sure the information is all correct click the **'Save'** button.

## Cancel Private Fostering Arrangements that were arranged but did not Commence.

**N.B: If the Agreement is to end, You need to complete the ,Terminate Private Fostering Arrangement, Questionnaire.**

A new screen has been introduced to look at a summary of the private fostering placements that a Child/Young Person could have been in. You are required to cancel the Private Fostering Arrangement via the Maintain Private Fostering Placements screen follow the instruction below:-

1. Search for your Child/Young Person and bring them back to the 'My Client' screen.
2. Click on the 'Main Menu' icon on the left hand side.
3. Click on the folder 'Children Looked After' to open it.
4. Double click to select the option ' Maintain Private Fostering Arrangements' to open the Find Private Fostering Placement screen.



5. Highlight the placement you want to end and click on the **Details** button to open the **Private Fostering Placement** screen.

6. **'Subject ID'** – Defaults in automatically when you have already selected your client in the **My Client** screen.
  7. **'Notification of PF Start'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
  8. **'Arrangement Start Date'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
  9. **'Next Visit Creation Date'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
  10. **'Carer'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
  11. **'Carer End Date'** – Enter the start date of the Arrangement.
  12. **'Carer End Reason'** – Click on the drop down arrow and enter the appropriate end reason. **You only need to complete this information if there was a second carer as part of this arrangement.**
  13. **'Second Carer'** – This information defaults in when you enter the information in the Private Fostering Arrangement Visit Reg 8 Questionnaire.
  14. **'Second Carer End Date'** – Enter the start date of the arrangement.
  15. **'Second Carer End Reason'** – Click on the drop down arrow and enter the appropriate end reason.
- NB: Only complete points 16 – 19 if you are cancelling a Private Fostering Arrangement that had not commenced.**
16. **'Cancel Current Arrangement'** – Put a tick in the Tick box. (This can only be cancelled prior to a Private Fostering Arrangement Visit Reg 8 being completed.
  17. **'Cancel Date'** – Enter the date you were informed that the Private Fostering Arrangement would not take place.
  18. **'Cancel Reason'** – Click on the drop down arrow and select the appropriate cancel reason.
  19. **'Cancelled by'** – Enter your ID number.
  20. **'Notification Date of Private Fostering End'** – Enter the date you were informed that the Private Fostering Arrangement would not take place. (the reason for this is that when users go to view the placement from the summary screen it looks like the Private Fostering Placement is still active if you don't enter an End date.
  21. **'Arrangement End Date'** – Enter the date you were informed that the Private Fostering Arrangement would not take place.

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- 22. 'Notes'** – You can enter any relevant notes at this point if appropriate. **N.B.** Underneath the text box it will display how many characters remain before you are unable to record any further information.
- 23.** When you are sure the information is all correct click the **'Save'** button.