HOUNSLOW EARLY HELP MODULE (EHM) USER GUIDE

A guide to using Hounslow's Early Help Module (EHM)

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INTRODUCTION

EHM is the system that the council uses to record and coordinate Early Help interventions with families. It contains records for children and their family members from various sources (schools, social care, etc), some of whom will have a current (or previous) Early Help intervention, most of whom will not.

We call these Early Help interventions "Episodes". An episode begins when a set of needs are identified for a family and the family consents to a Team Around the Family (TAF) being convened to work on these needs. A TAF can consist of a wide range of professionals including those from the education and health sectors. The episode ends when the family's needs have been met (or no further progress can be made) or the family withdraws consent. A family can have multiple episodes (one after the other) but can never have more than one at a time.

Every episode has an Episode Coordinator who is responsible for coordinating the intervention and the members of the TAF. In most cases, you will be the Episode Coordinator.

1. When you log into EHM and click Home (see **LOGGING IN TO THE SYSTEM**), you will see your work-tray. This contains a list of the episodes you are currently the coordinator for and any tasks associated with them.

2. If the work / information you want to record relates to an episode already in your work-tray (i.e. who you are the coordinator for) jump to step 5.

3. If you want to create an episode for a child / family who's not already in your work-tray, you'd first search the system to see if you can find an existing record for them (see **SEARCHING FOR A PERSON**).

   a. If you found a record for them, you'd open it and see whether they had an existing episode (that someone else was coordinating).

      i. If they did have an existing episode, you could make a request to become a member of that TAF (see **REQUESTING ACCESS TO AN EIS EPISODE**). Your request would be sent to the coordinator and if approved, you'd then be able to access the episode and see (on a read-only basis) the work being undertaken. In this case you'd be a Contributor or Observer of the episode rather than the Coordinator and the rest of the process doesn't apply.

      ii. If they didn't have an existing episode you'd complete a form asking us to set one up for you (see **CREATING AN EIS EPISODE**).

   b. If you were unable to find a record for the child / family, you would complete a form asking us to create records for the child and their family members and to create an episode for them (see **CREATING AN EIS EPISODE**).

4. After we've created the episode for the family, you will have a task in your work-tray to complete the Early Help Assessment (see **RECORDING AN EARLY HELP ASSESSMENT**).

5. If you open the episode (see **VIEWING AN EIS EPISODE**), you will now be able to carry out a number of activities including;

   a. Restarting / updating the assessment (see **RECORDING AN EARLY HELP ASSESSMENT**)
   b. Recording a TAF Meeting (see **RECORDING A TAF MEETING**)
   c. Requesting to close the episode (see **CLOSING AN EIS EPISODE**)

If you get stuck at any time, please get in contact with us – earlyhelphub@hounslow.gov.uk or call 020 8583 6653.

LOGGING IN TO THE SYSTEM

> **i** To log into EHM you will need a Login ID and Password. If you do not have these, you will need to speak to the Nominated Officer for your organisation who will submit a request to us to create these for you. Once ready, your Login ID and Password will be e-mailed to you via secure e-mail.

1. Open a web browser (we recommend Internet Explorer, Edge or Chrome), and navigate to https://hounslowehm.syhapp.com (if you're Hounslow staff accessing the system via the Hounslow network you'll need to use a different URL which you'll received along with your Login ID and password). The login page below will now appear…

User Login ID

Your User Login ID is how you identify yourself to the system.

If your password or secret questions have been compromised you should change them immediately. You can do this by logging in and selecting Update My Profile from your home page.

Security Check

The address bar at the top should start with https, identifying a secure page.

If it does not, or there is no address bar, you may be about to give away your security details.

Sign In

Please enter your Login ID:

[   ]

OK

2. Enter your Login ID as shown below, and then click the OK button…

Sign In

Please enter your Login ID:

[peter.brown   ]

OK

> **i** Your Login ID is not case sensitive.

> **i** If you've forgotten your Login ID please get in contact with us – **earlyhelphub@hounslow.gov.uk** or call 020 8583 6653.

3. The password page below will now appear…

Sign In

Hello **peter.brown**

Please enter the **third, fifth** and **sixth** characters of your password:

● ● [|] ● [ ] [ ] ● ● ●

Forgotten Password? Click here

OK Cancel Reset

User Login ID

Password

We will never ask you for your complete password when you login

For security, we will NEVER ask you for your complete password when you login.

The characters requested here will not change.

If you make a mistake here, this page will continue to ask for the SAME part of your password as before.

If you close the web browser, then open it again and come back to this page, you will be asked for a different set of characters.

4. Enter the requested characters from your password (in the example below, you're being asked for the 3rd, 5th and 6th characters) and then click the OK button…

Sign In

Hello **peter.brown**

Please enter the **fourth, sixth** and **eighth** characters of your password:

Forgotten Password? Click here

| OK | Cancel | Reset |

ⓘ Your password **is** case sensitive

ⓘ If you've forgotten your password, click the ***Forgotten Password? Click here*** link and follow the instructions. See **RESETTING YOUR PASSWORD** elsewhere in this guide for more information.

5. The secret question page below will now appear asking you to answer one of your secret questions that it has picked at random…

Sign In

Hello **peter.brown**

Secret Question: **My favourite animal**

| OK | Cancel |

User Login ID

Your User Login ID is how you identify yourself to the system.

Your Secret Question

This is one of your secret questions.

This is third defensive barrier to control access to this system.

You need to type in the answer to the question EXACTLY as you previously entered it when setting up your secret questions.

ⓘ You would have chosen your secret questions and answers when completing the registration process for your EHM Login ID and password. If you've forgotten these, please get in contact with us – earlyhelphub@hounslow.gov.uk or call 020 8583 6653.

6. Enter the answer to the secret question that you've been asked and then click the OK button…

Sign In

Hello **peter.brown**

Secret Question: **My favourite animal**

●●●

| OK | Cancel |

ⓘ Your secret answers are not case sensitive.

7. If you're Hounslow staff accessing the system via the Hounslow network jump to point 9. Otherwise, the authentication code page below will now appear asking you to enter the authentication code that will have been e-mailed to you once you answered your secret question…

Sign In

Hello **peter.brown**

Please enter the Authentication Code:

[   ]

[OK] [Cancel]

User Login ID

Your User Login ID is how you identify yourself to the system.

Authentication

You will be sent an Authentication Code, when you receive it please enter it here.

ℹ Your authentication code will be e-mailed to the e-mail address that the Nominated Officer for your organisation gave us when they requested your Login ID and password. This will be your professional (work) e-mail address and not a personal e-mail of your.

ℹ If, instead of the box to enter your authentication code, you see a message saying "Failure sending the authentication email. Please contact the system administrator." then please contact us – it most likely means there was a typo in the e-mail address we were provided for you.

ℹ The e-mail containing your authentication code will look something like this…

EU Fri 12/07/2019 10:37
ECAF UAT <donotreply@liquidlogic.co.uk>
Your code for EHM login

Dear Peter Brown,

Thank you for using EHM. Please enter the following code on the login verification page:

5934 2896

Kind regards

EHM Support Team
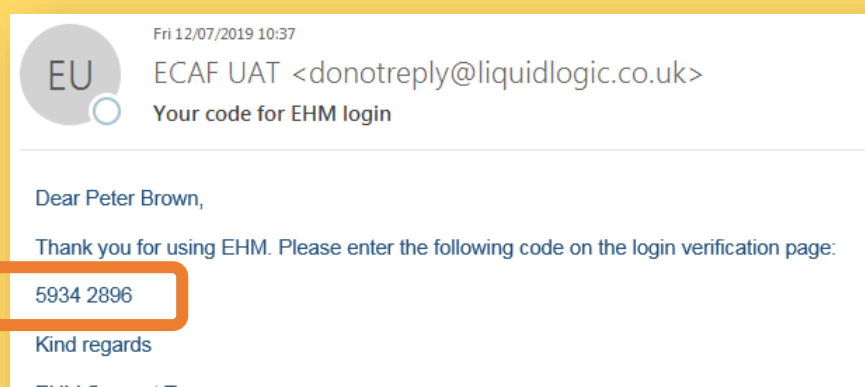
The authentication code that you need to enter into EHM is on the 3rd (middle) line, is always take the form of four numbers, a space, and another four numbers (you do not need to enter the space when typing this into EHM).

---

8. Enter the authentication code you were sent and then click the OK button…

Sign In

Hello **peter.brown**

Please enter the Authentication Code:

[••••••••]

[OK] [Cancel]

9. The login process is now complete and you will now see the *Tiles* page…
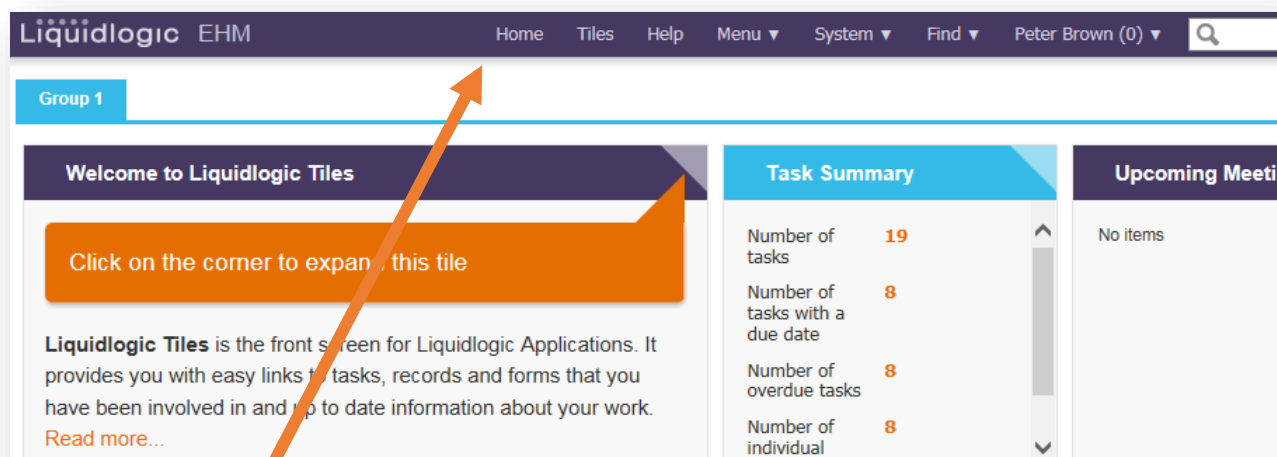
i We don't find the *Tiles* page particularly helpful, so we usually ignore this.

10. Click on the *Home* link in the menu along the top of the screen, you will now see your home which will look something like below…
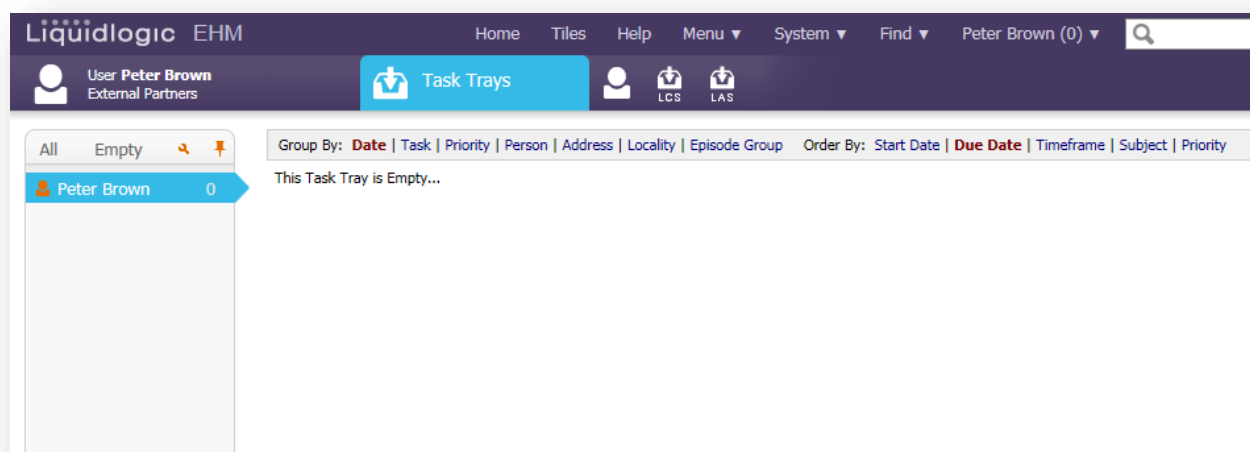
LOGGING OUT OF THE SYSTEM

When you have finished doing what you need to in EHM, you ***must*** log out.

> ℹ️ Simply closing your web browser does not log you out and if the browser is re-opened shortly afterward, your session can resume under certain circumstances. This means that someone else coming along to use your computer after you could potential open the browser and gain access your EHM session.

You logout out of EHM as follows…

1. In the top right hand corner of the EHM home page you will see your name…
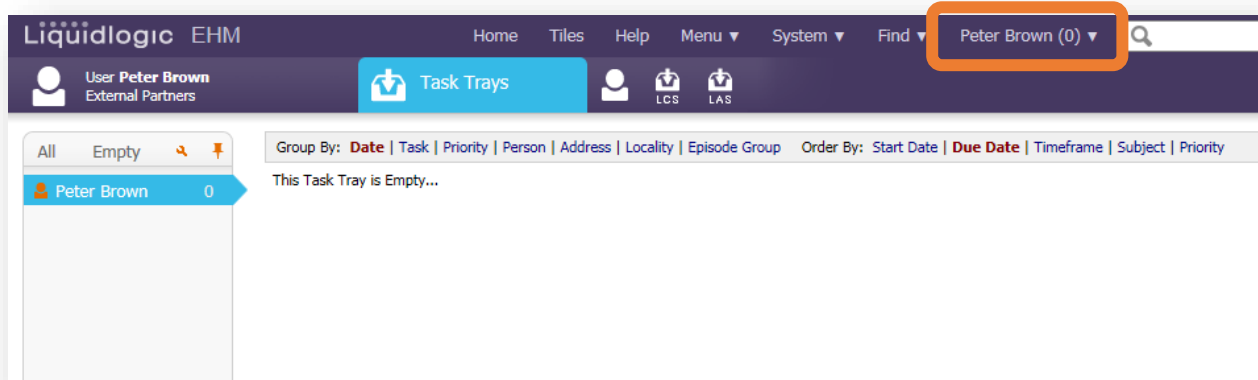
2. Place your mouse over your name – but ***do not*** click on it. A menu should pop-up…
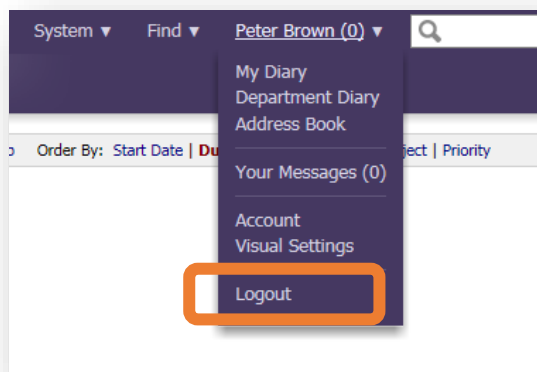
3. Click on the Logout option at the bottom of the menu.

> ℹ️ After 10 minutes of inactivity your EHM session will automatically logout. One minute before it does this a warning message will appear asking you whether you want to stay logged in. If you don't click to say yes, you will be automatically logged out and any unsaved work may be lost.
>
> EHM doesn't recognise typing into a text box as activity, so if you click into a text box and start typing up some meeting minutes you may well see this message box after 9 minutes – make sure you click the appropriate button in time to stay logged in.
>
> Better still, as with any system, you should be saving your working regularly (every few minutes) because your computer may crash, there may be a powercut, your internet connection may go down, etc. Doing so guards against you losing work.

RESETTING YOUR PASSWORD

> ℹ️ Remember, your password **is** case sensitive so it might be worth double-checking that you used the correct capitalisation when entering it before resetting it.

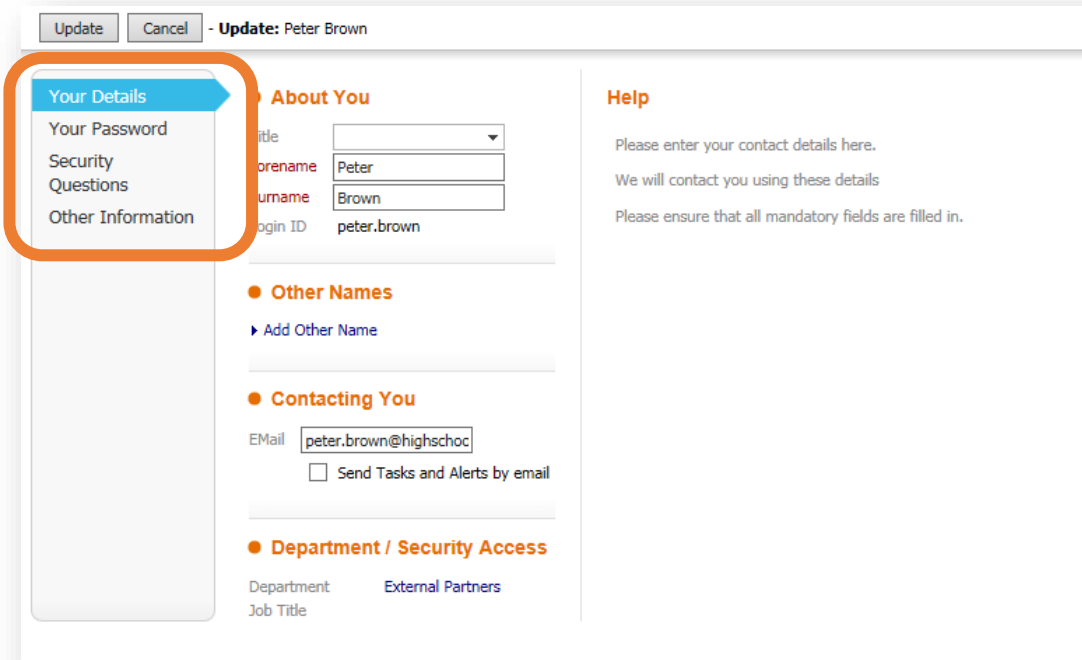1. If you're not already on the password screen, follow steps 1-3 under **LOGGING IN TO THE SYSTEM**.

2. Click on the *Forgotten Password? Click here* link…

Sign In
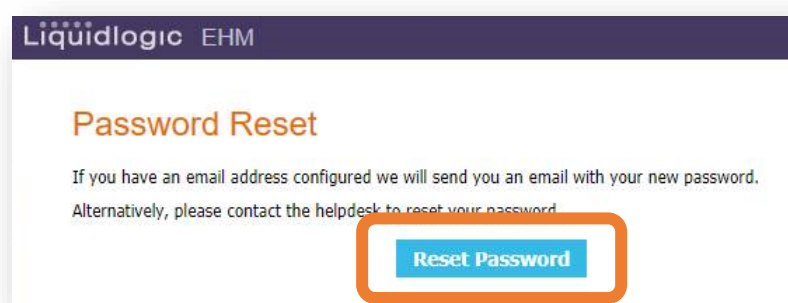
Hello **peter.brown**

Please enter the **fourth**, **sixth** and **eighth** characters of your password:

[ ] [ ] [ ]

Forgotten Password? Click here

OK   Cancel   Reset

3. You will now see the following screen that is basically asking you if you're sure, click the *Reset Password* button…

Liquidlogic EHM

Password Reset

If you have an email address configured we will send you an email with your new password.
Alternatively, please contact the helpdesk to reset your password.

Reset Password

4. You will now see the following screen confirming that an e-mail has been sent to you. You can now close the browser window.
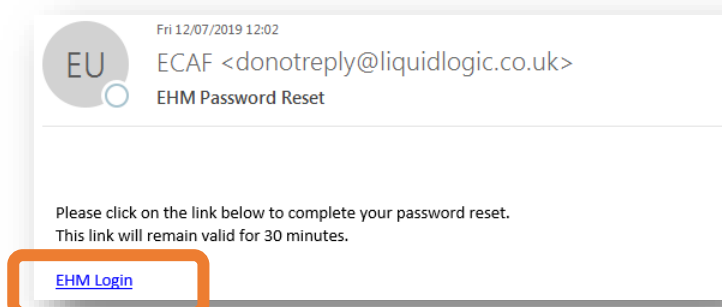
Liquidlogic EHM

Password Reset

An email has been sent with your new password.

5. Open the e-mail you will have received – it should look something like this…
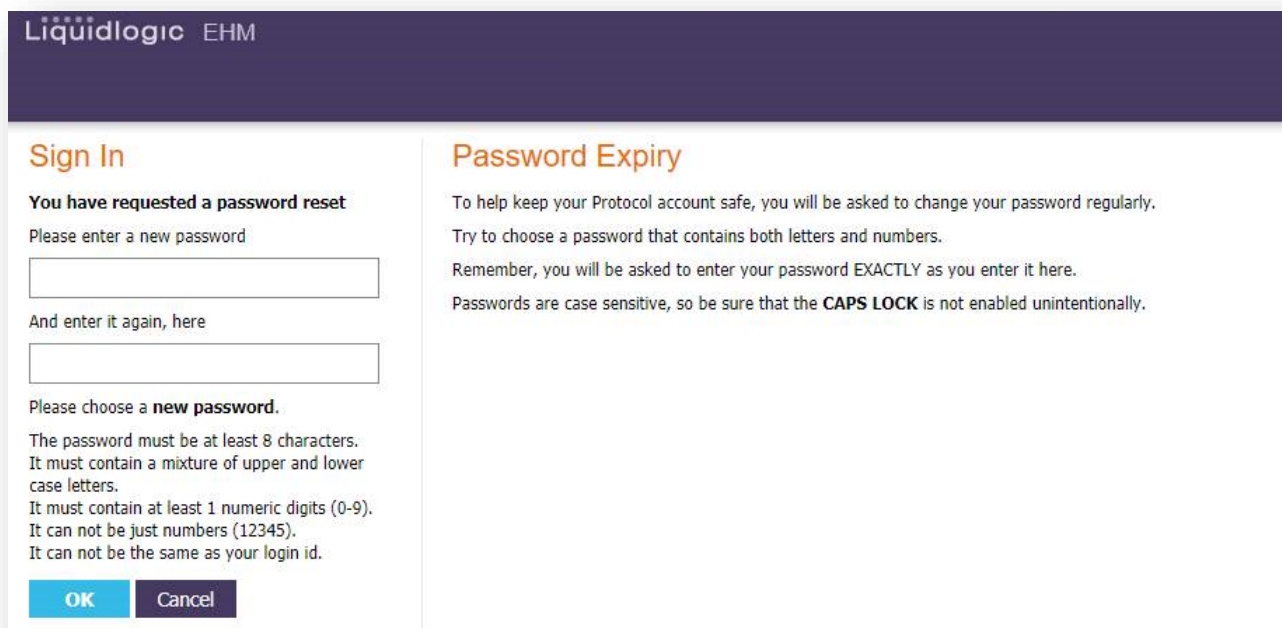
EU

Fri 12/07/2019 12:02
ECAF <donotreply@liquidlogic.co.uk>
EHM Password Reset

Please click on the link below to complete your password reset.
This link will remain valid for 30 minutes.

EHM Login

6. Click on the *EHM Login* link.

7. A new browser window will open taking you the password reset page…

8. Enter your new password (twice) and then click the OK button.

9. You will be taken back to the EHM login screen where you will be able to try logging in again.

CHANGING YOUR ACCOUNT SETTINGS (YOUR PASSWORD AND SECRET QUESTIONS)

4. If you're not already logged into EHM, follow steps 1-8 under **LOGGING IN TO THE SYSTEM** to do so.

5. In the top right hand corner of the EHM home page you will see your name…
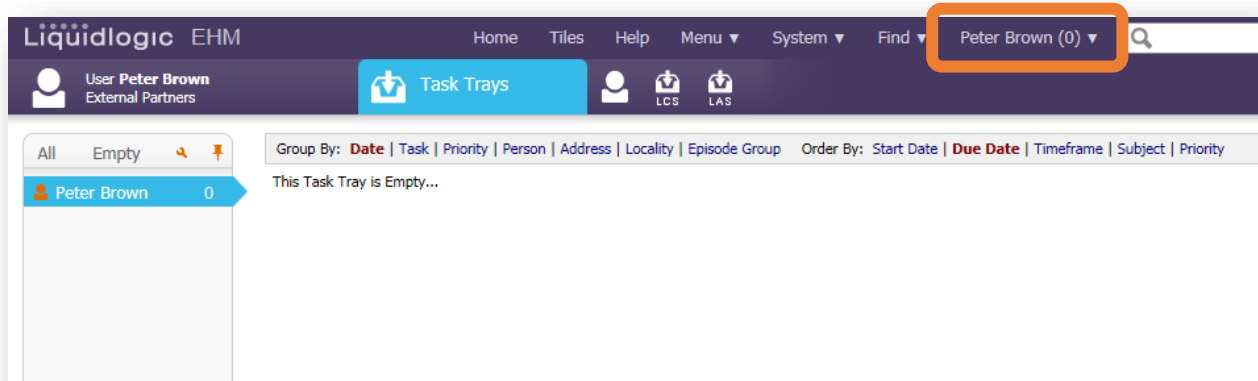
6. Place your mouse over your name – but **do not** click on it. A menu should pop-up…
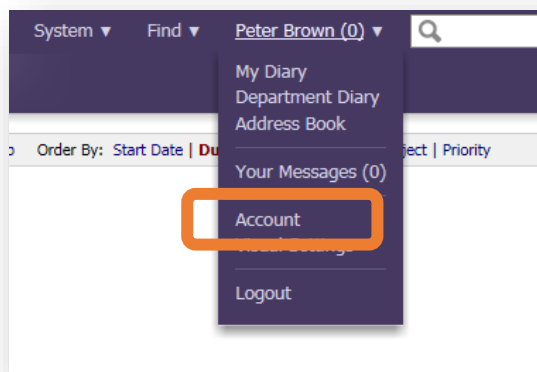
7. Click on the *Account* menu item.

8. A screen will appear showing the details of your user account…
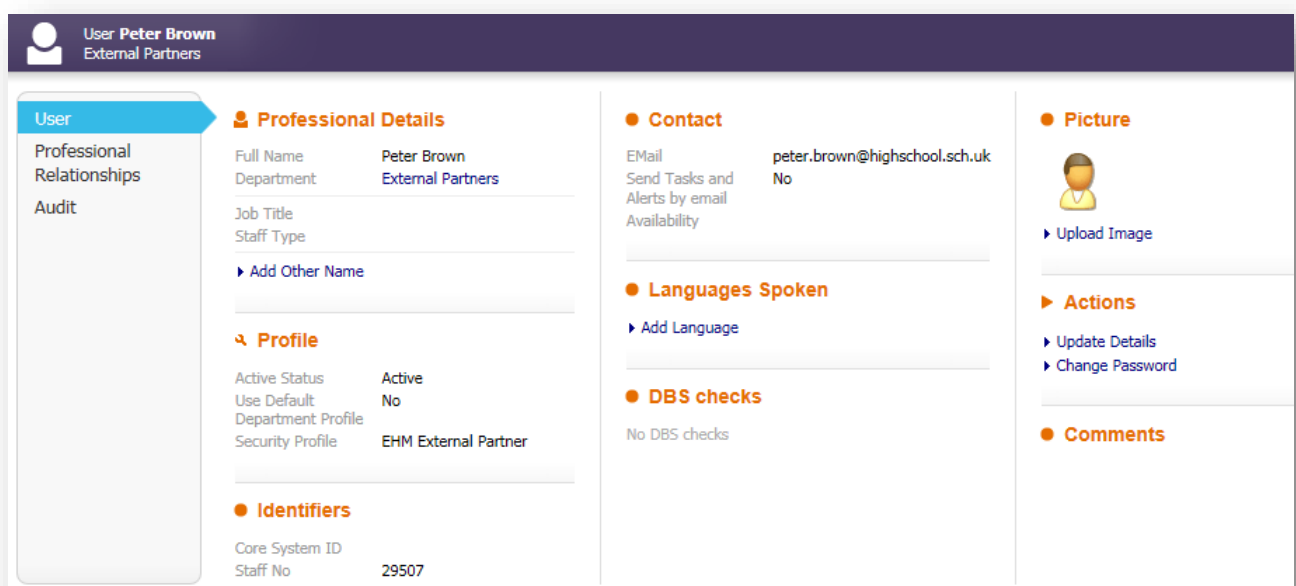
9. Click on the *Change Password* link under the *Actions* heading to the right-hand side of the screen…
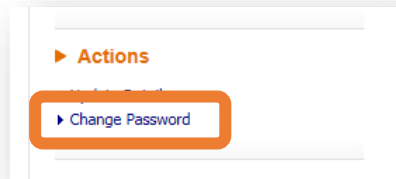
10. You will now see the following screen with a series of tabs down the left-hand side of the screen…

11. On the *Your Details* tab you have the ability to update your name and e-mail address but you should refrain from doing so.

> ⓘ If you would like to alter these details please speak with us first – **earlyhelphub@hounslow.gov.uk** or call 020 8583 6653.

12. On the *Your Password* tab you can update your password (you need to enter your current password, and then your new password twice).

13. On the *Security Questions* tabs you can update your secret questions and answers that you use when you log into the system.

14. On the *Other Information* tab you enter other information about yourself that you think might be useful for other users to know about you. At the moment there is nothing specific that we need / want you to record here.

15. When you've finished making changes on the various tabs, click the Update button in the top left-hand corner of the screen and your changes will take effect.

CHANGING YOUR VISUAL SETTINGS (HOW EHM APPEARS)

1. If you're not already logged into EHM, follow steps 1-8 under **LOGGING IN TO THE SYSTEM** to do so.

2. In the top right hand corner of the EHM home page you will see your name…
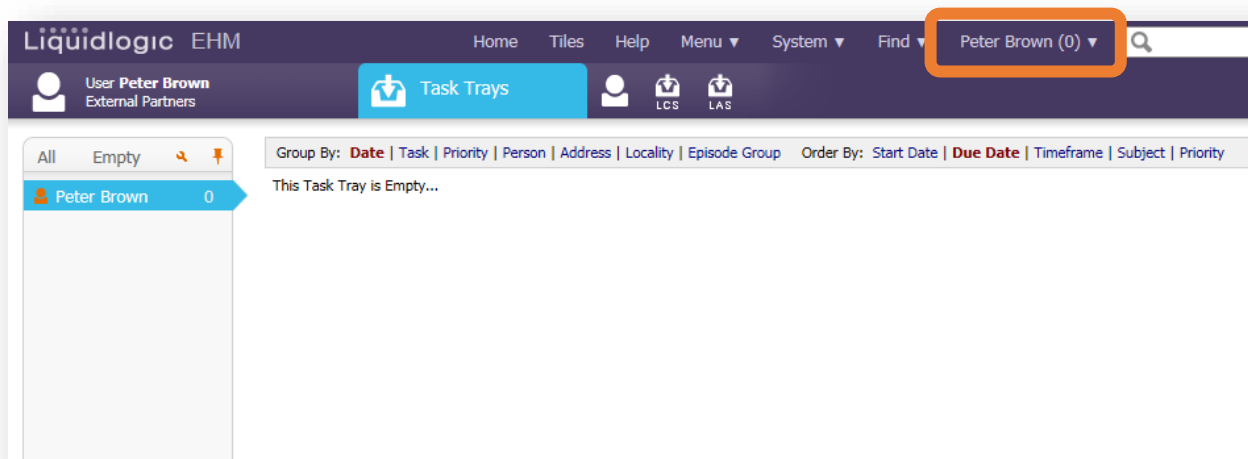
3. Place your mouse over your name – but **do not** click on it. A menu should pop-up…
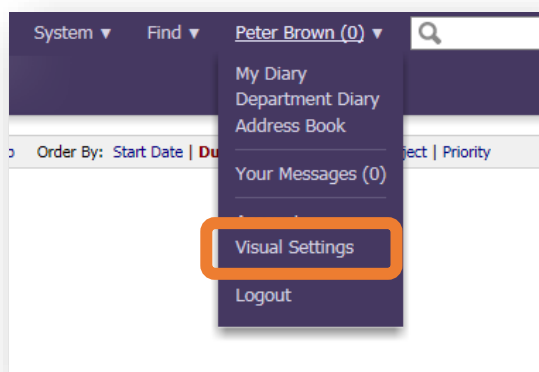
4. Click on the *Visual Settings* menu item.

5. The screen below will appear…
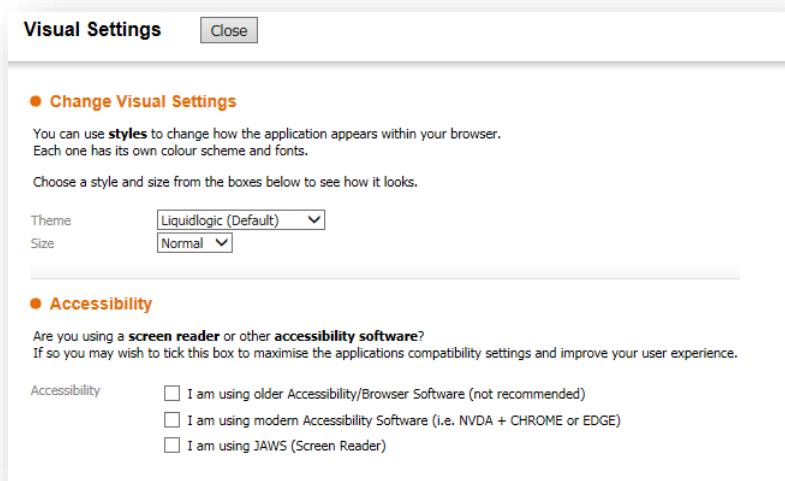
6. Under the *Change Visual Settings* heading you have a couple of options…

    a. *Theme* – this changes the colour scheme used by EHM which can help those with difficulties interpretting colours, and to improve the contrast between colours

    b. *Size* – this changes the default font size used within EHM (although you may prefer adjusting the Zoom setting in your browser).

    > **i** Changes to these settings are applied immediately and will be visible as soon as you make them.

7. Under the *Accessibility* heading you have a few options that will help improve EHM's compatibility with the market leading screen readers and other accessibility software packages.

    > **i** Changes to these settings are applied immediately but are not generally visible.
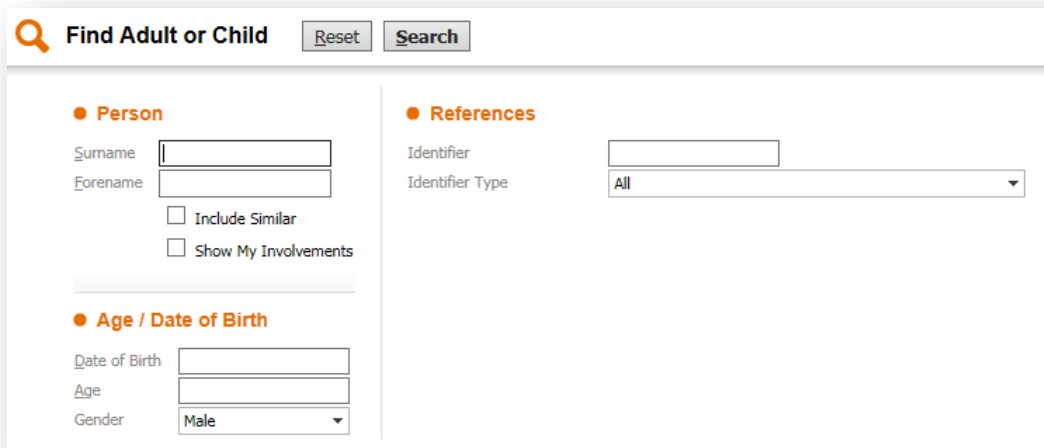
8. When you're finished, click the *Close* button.

SEARCHING FOR A PERSON

1. If you're not already logged into EHM, follow steps 1-8 under **LOGGING IN TO THE SYSTEM** to do so.

2. Click on the **Find** link in the menu bar across the top of the screen…
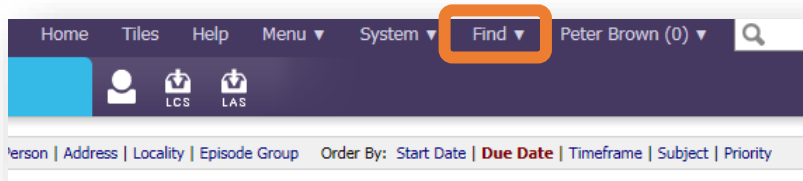
3. The **Find Adult or Child** screen will appear as follows…

> ℹ️ If the screen shows a list of records as below, EHM has taken you the list of results of the last search you did. If this happens, simply click the Back button and you'll see the screen above.
>
>

4. It's usually a good idea to click the **Reset** button at this point as EHM automatically brings in the values that you last searched on. For example, did you notice in the screenshot in point 3 that **Gender** is set to "Male"? These residual values can be easily missed and easily spoil your search. Clicking **Reset** clears all of the search fields.

5. When searching, it's always best to search on something unique to a person, an ID (identifier) for example. If you know an identifier for the person, enter it in the **Identifier** field.

6. If you don't have a unique identifer you will need to try searching on their forename, surname and/or date of birth. When searching on forenames and surnames, it's important you use wildcards.

> **i** Whether you're sure of the spelling of the person's name or not, bear in mind that they might have a record in EHM but with a slightly different (incorrect) spelling. For this reason, as with any search, you should be mindful to avoid searching on words and phrases that have the potential to be misspelt or shortened.
>
> To avoid excluding records from your searches because they might be spelt slightly differently or shortened, replace any parts of the search phrase that could cause problems with a % (percentage sign). This is the 'wildcard' character that EHM uses. A wildcard tells the system to accept any combination of characters of any length in it's place.
>
> So, imagine you were looking for someone and you thought their firstname was spelled "Lin". They exist in the database but their firstname is spelled "Lyn".
>
> If you searched for "Lin" you'd only see records matching that exactly spelling i.e you wouldn't find the correct record. To get around this you should search for "L%n". This would return any name beginning with "L" and ending with "n" i.e. it would ignore anything in between. You would then see records for both "Lin" and "Lyn".
>
> Of course, the person's name might also be stored as "Lynne" or "Linda". Searching on "L%n" would only return names beginning with "L" and ending with "n", so you wouldn't find these records as they don't end with "n". To allow for this eventuality, you could search on "L%n%".
>
> Of course, searching on firstname only is going to return a very long list of names, so you'll always want to include the surname in your search to whittle the results down. As with the firstname, use wildcards to replace any parts of the surname that can easily be mispelled or truncated.
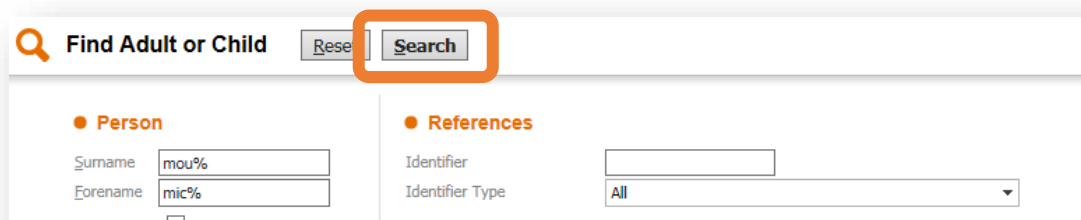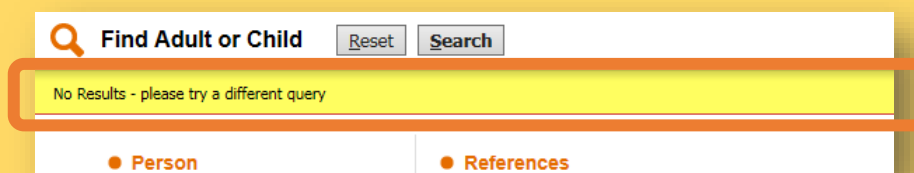
7. Once you've entered your search criteria, click the **Search** button.

> **i** If your search criteria yield no results, a yellow banner will appear near the top of the screen as shown below…

> If you were searching on a field that doesn't accept wildcards (*Identifier* or *Date of Birth*) and you can't find a record with an exact match, you should now consider searching on their name using wildcards where appropriate.
>
> If you were searching on the person's name and were using wildcards, have a think about whether it's possible you're accidently excluding records. For instance, if you were searching on "Chri%" hoping to find records for "Chris" or "Christopher", bear in mind that maybe it's stored in the database as "Kris".

> **i** If you're still unable to locate an existing record for the person it may well be because they do not have one. You are unable to create a record for them yourself, but you can send us a request for us to do this for you. Please see **CREATING AN EIS EPISODE** elsewhere in this guide for more information.

8. If your search yields results you will now be presented with a list of them…

Find Adult or Child [Back] [Printable View]

•	Case No	A.	Forename ▲	Surname ▲	Age	Date of Birth	Address Type	Area	Town	County	Post Code
1	5061043	❗	Mick	Mouse	12 years	01-May-2007	Main Address		Hounslow		TW3 4DN
2	1059753		Mickey	Mouse	8 years	06-Jul-2011	Main Address		Hounslow		TW4 6HT
3	5061043		Mickey	Mouse	12 years	01-May-2007	Main Address		Hounslow		TW3 4DN

Query Results (3)

> **i** Even though the list above contains three rows, it only relates to two people. You can see this by looking at the **Case No** column. The 1st and 3rd rows both relate to the same case number. This person is listed twice because they go / have gone by two different names e.g. Mick and Mickey. Both variants are shown to help you identify him in the list.
>
> You would also see multiple rows for him if we had previous addresses for him – one row for each name at each previous address.

> **i** Searching on names will often return records for numerous other people who share the same name – as in the 2nd and 3rd rows in the above screenshot.
>
> Where this happens, you can hopefully use the information in the Age, Date of Birth and Postcode columns to identify the correct one.

> **i** If you're still unable to locate an existing record for the person it may well be because they do not have one. You are unable to create a record for them yourself, but you can send us a request for us to do this for you. Please see **CREATING AN EIS EPISODE** elsewhere in this guide for more information.

9. Once you've identified the correct person in the list of results, click on them. You will then be taken to their EHM record… For more information see **VIEWING A PERSON'S RECORD**.

Mickey Mouse, 8 years (Case No: 1059753)   Basic Demographics

Personal

Personal

● **Name & Gender**

Case Number	1059753
Title	Mr
Surname	Mouse
Forename	Mickey
Gender	Male

● **Age / Date of Birth**

Actual DOB	06-Jul-2011
Age	8 years
	☐ Unborn Child

▸ Send a message about this Person

● **Troubled Family**

☐ Is this a Troubled Family cohort?

Relationships

Mr Mickey Mouse - 8 years
This Child

Mrs Mouse Margaret - 84 years
Mickey's Mother

VIEWING A PERSON'S RECORD

1. Having searched for and opened the record of an adult or child you will see the following screen (for more information on searching for a person see the **SEARCHING FOR A PERSON** section elsewhere in this guide).

2. At the top of the screen you will the person's name, age and Case No.

> ℹ The Case No is a unique identifier for the person which never changes. When you speak to us about someone, you should quote this number. We may also refer to it as the person's EHM ID, or even their LCS ID.

> ℹ When e-mailing us about someone you should never write their name or any personally identifiable details in your e-mail. Only ever quote their Case No.

3. If the person is a child you may see some / all of the following icons too...
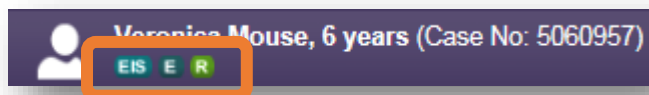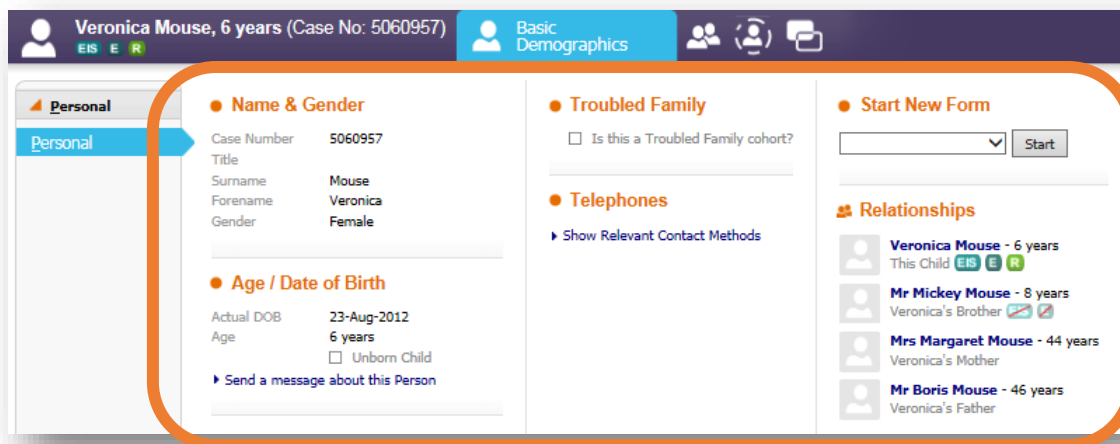
4. If you see the **R** icon it means that the child has an active referral in our Social Services case management system i.e. the child is open to social care.

5. If you see the **E** icon it means that the child has an active referral (or Episode as we call it) in EHM.

6. If you see the **EIS** icon it means that the child has had an Early Help assessment (CFAN) carried out during their current episode.

> ℹ If the icon has a diagonal red line through it (for example 🗷) this means there has previously been at least one of these but there are currently none active i.e. any previous ones are now closed.

7. In the main part of the screen you will see some basic details about them…

> **ℹ** This is a very limited view of the information we hold about a person. It's designed to be just enough for you to be sure that you're looking at the correct record.

8. If you can see the **E** icon you can click on this to view the current episode for this child.

> **ℹ** If you are a member of the TAF (Team Around Family) and the family has consented to you being involved in the episode, you will then see the *Episode Details* screen. See the section **VIEWING AN EIS EPISODE** elsewhere in this guide for more information on that.
>
> If you are not a member of the TAF and/or we haven't yet recorded that the family has consented to you being involved in the episode you will see an *Access denied* screen. If you would like access to the episode see the section **REQUESTING ACCESS TO AN EIS EPISODE** elsewhere in this guide for more information.

9. If you cannot see the **E** icon and would like us to set up an episode please see the section **CREATING AN EIS EPISODE** elsewhere in this guide.

REQUESTING ACCESS TO AN EIS EPISODE

1. If you see the following screen when trying to access an episode it is because the family has not given consent to you being involved in the episode, or has given consent but we haven't yet recorded this on the system.
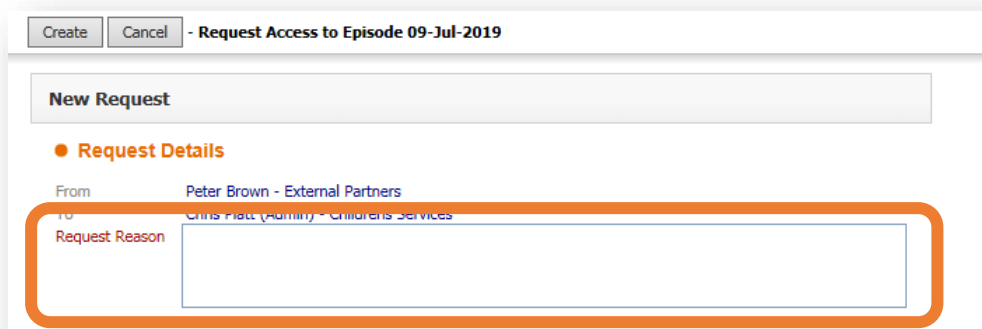
2. To request access to the episode click on the *Click here to Request Access* link.

3. On the next screen enter the reason you're requesting access and click the *Create* button…

4. You will now see a record of your request having been made…

5. The Status of your request will show as *Pending* until the Episode Coordinator has had chance to look at your request and either accept or reject it.

> ℹ️ The Episode Coordinator will contact the family (if necessary) to check that they have consented to you being involved in the episode.

6. Once a decision has been made, a notification will appear in your work-tray like below telling you whether you request was accepted or rejected…
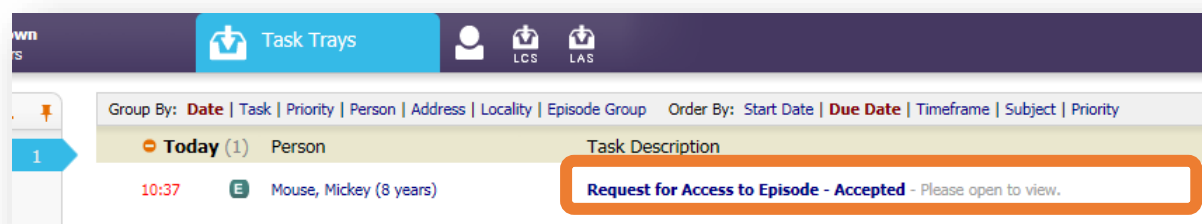
7. Click on the task to view the details of your request…
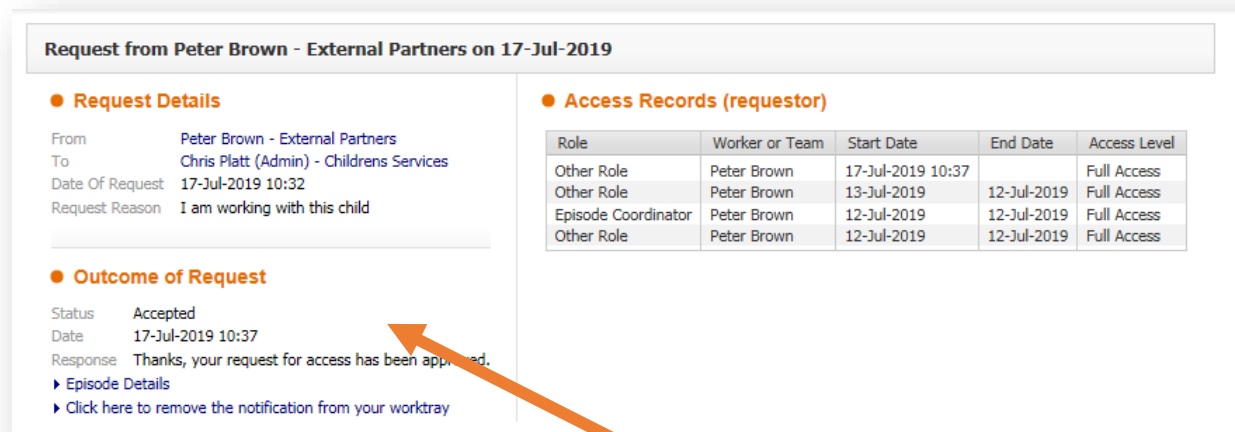
8. Check for any comments left by the Episode Coordinator under the *Outcome of Request* heading…
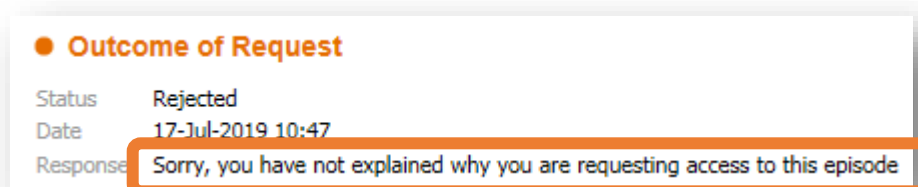
> ℹ️ The comments here will be particularly important if your request was rejected as they will explain why.

9. When you are finished, click the ***Click here to remove the notification from your worktray*** link

> ℹ️ This will simply clear the notification from your work-tray. Don't worry, if you were granted access, clicking this does not affect that access in any way, you will still have access.

10. If your request for access was granted, you will now be able to access the episode (see the section **VIEWING AN EIS EPISODE** elsewhere in this guide for more information).

11. If your request was rejected and the reason given by the Episode Coordinator was that they needed further information for example, you will now need to create a new request (go back to point 2).

DEALING WITH REQUESTS FOR ACCESS

As covered in the section named **REQUESTING ACCESS TO AN EIS EPISODE** it is possible for EHM users to request access to episodes. These requests are sent to the Episode Coordinator and appear as tasks in their work-tray.

If you are the Episode Coordinator it is possible that another user might request access to your episode. If this happens, a task to approve or reject their request will appear in your work-tray.
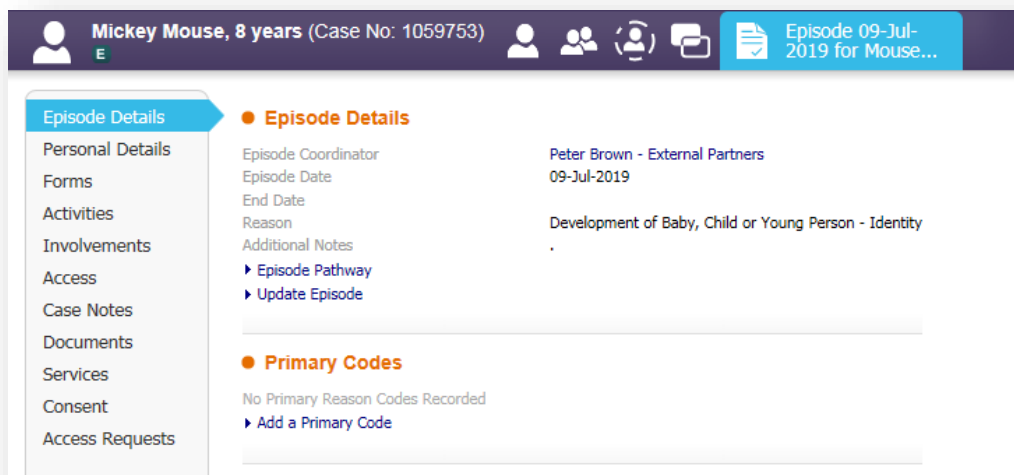
You will not be able to action this task yourself, you will need to contact us - earlyhelphub@hounslow.gov.uk or call 020 8583 6653.

We will ask you to reassign the task to us and whether you'd like to approve or reject the request. For more information on reassigning tasks see the section **REASSIGNING TASKS** elsewhere in this guide.

We will then carry out the action on your behalf, seeking consent from the family if necessary.

VIEWING AN EIS EPISODE
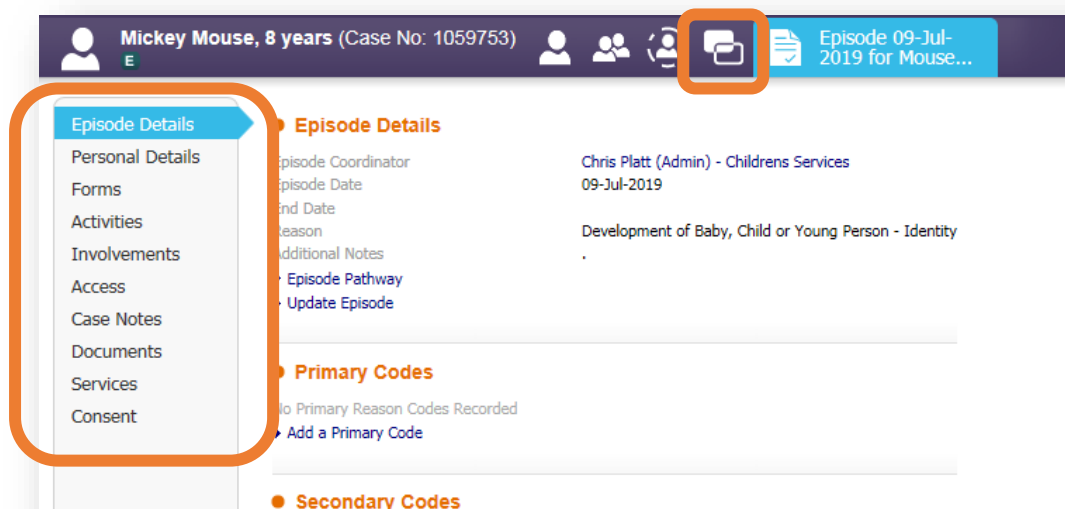
1. Having clicked on the **E** icon you should now see the Episode Details screen which looks like this…

> ℹ️ If you see a screen that looks more like this, it is because the family has not given consent to you being involved in the episode, or has given consent but we haven't yet recorded this on the system. To request access, see the section **REQUESTING ACCESS TO AN EIS EPISODE** elsewhere in this guide.
>
>

2. There are two main things here that you need to note; the tabs running downwards along the left-hand side of the screen and the icon with two overlapping rectangles at the top of the screen (called the *Case Pathway* icon)…
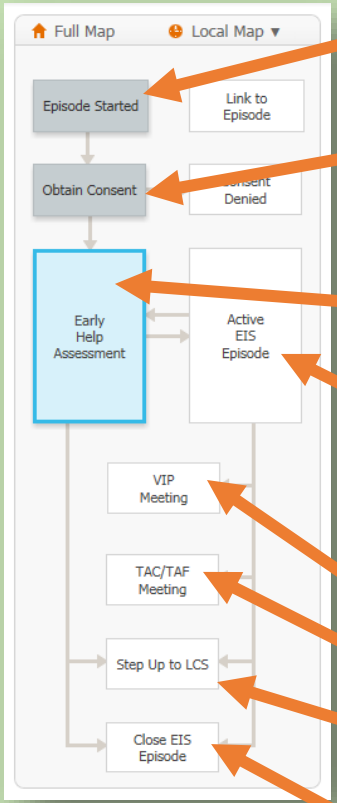
The tabs

The tabs show you information about the episode. The tabs are listed below along with a brief description of the information they contain.

Tab Name	Description
Episode Details	Shows information about the episode itself e.g. when it was created and why, and who the family consents to having access to it.
Personal Details	Demographic information about the child e.g. address, ethnicity, religion, communication details, legal statuses, disabilities, other special requirements, etc.
Forms	Lists forms (pieces of work completed on the system) relating to the episode. You can also start new forms from this tab.
Activities	Summarises the work that has been done on this episode.
Involvements	Shows you who is involved in the episode and what their role is. This tab also shows any active / outstanding tasks and who they're allocated to.
Access	Who has access to the episode, what type of access and for what period of time.
Case Notes	Includes a case summary and list of notes about the case. You can also add new case notes via this screen.
Documents	Lists documents (work completed outside of the system) relating to the episode that have been uploaded to the system. You can also upload new documents from this tab.
Services	Lists any services that have been commissioned for this child.
Consent	Lists the consent statements that have been recorded for this episode.

The Case Pathway icon

Clicking on the *Case Pathway* icon will take you to the Case Pathway screen where you will see a 'map' of the episode i.e. the various stages and events that you follow when working on a EIS episode…

Stage Name	Description
Episode Started	This step is completed by the Early Help Hub on your behalf when you follow the steps in the CREATING AN EIS EPISODE section of this userguide.
Obtain Consent	This step is completed by the Early Help Hub on your behalf when you follow the steps in the CREATING AN EIS EPISODE section of this userguide. However, you may need to come back to this step at a later time to update the Consent Record.
Early Help Assessment	This is the very first stage that you need to complete – the Early Help Assessment (CFAN). Once completed, the EIS icon will show against the child's record.
Active EIS Episode	This step represents the episode and only becomes active once you've completed the Early Help Assessment. Clicking on it shows you the tabs mentioned a little earlier where you can view information about the episode. This isn't actually a stage that requires you to do anything.
VIP Meeting	You can ignore this step.
TAC/TAF Meeting	This step is where you would record the TAF Meetings that you hold.
Step Up to LCS	This step is completed by the Early Help Hub on your behalf when you follow the steps in the STEPPING UP TO SOCIAL CARE section of this userguide.
Close EIS Episode	If triggered, this stage allows you to close the episode. This will first need to be approved by us (the Early Help Hub) though.

Using colours, it also tells you whether a step has not yet been started (these will be white), whether it's been started but not yet finished i.e. is active (these will be in blue) and completed (these will be in grey). For example…
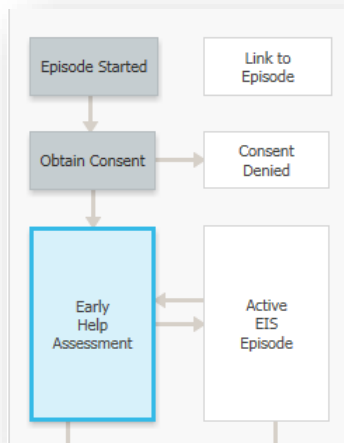
The *Episode Started* and *Obtain Consent* stages have been completed and the current stage is to complete the *Early Help Assessment*
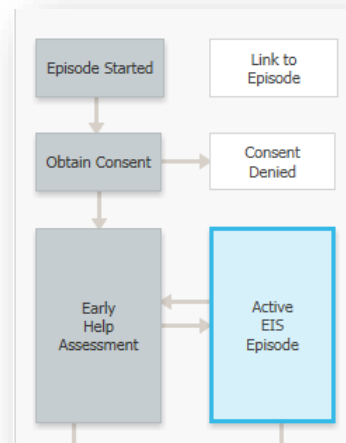
The *Episode Started, Obtain Consent* and *Early Help Assessment* stages have been completed and there is an *Active EIS Episode*
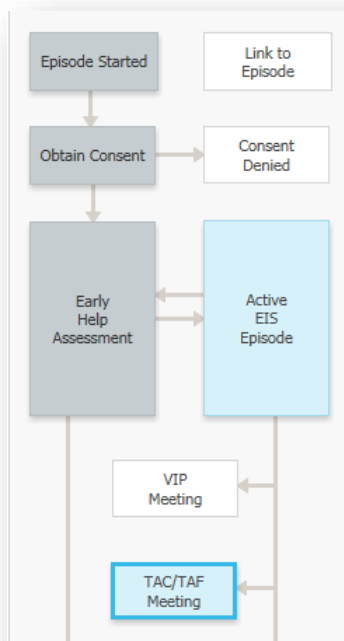
The *Episode Started, Obtain Consent* and *Early Help Assessment* stages have been completed and there is an *Active EIS Episode* with a *TAC/TAF Meeting* in progress
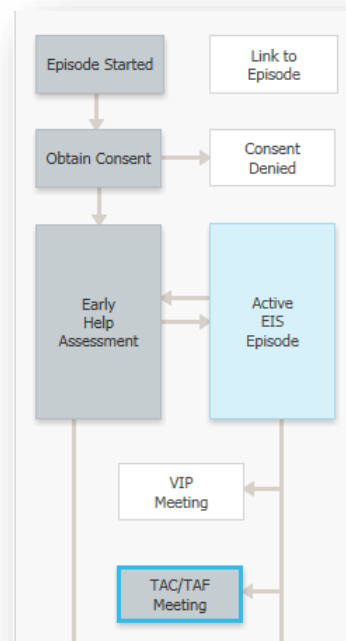
The *Episode Started, Obtain Consent* and *Early Help Assessment* stages have been completed and there is an *Active EIS Episode* with a completed *TAC/TAF Meeting*

A step becomes active (blue) when you complete a previous step. Sometimes that previous step gives you a choice of which step to start next (known as an "outcome") and sometimes it won't (it'll just start a specific step for you).

If you have an *Active EIS Episode* and click on the *Decisions* tab for it, you can usually manually start any of the steps from there…
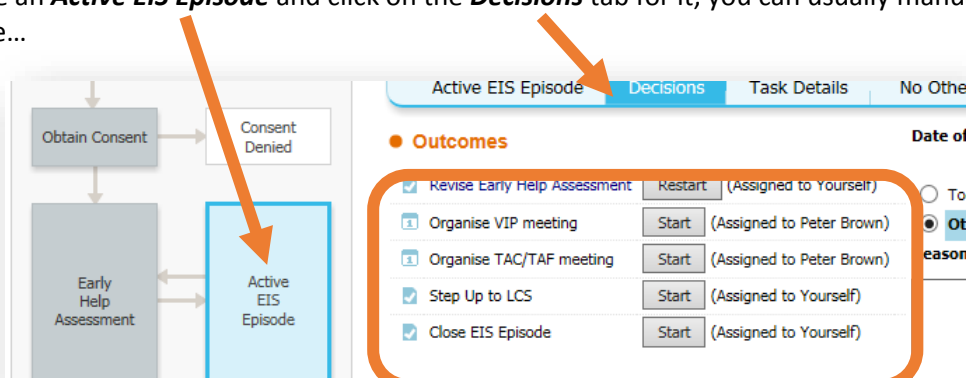
CREATING AN EIS EPISODE

You can't actually create an episode yourself. To do this, you will need to complete the *Request Episode Creation* form on EHM that gives us the information we need to do this on your behalf. Once we have done this, you will be able to complete the Assessment, record TAF Meetings and close the episode.
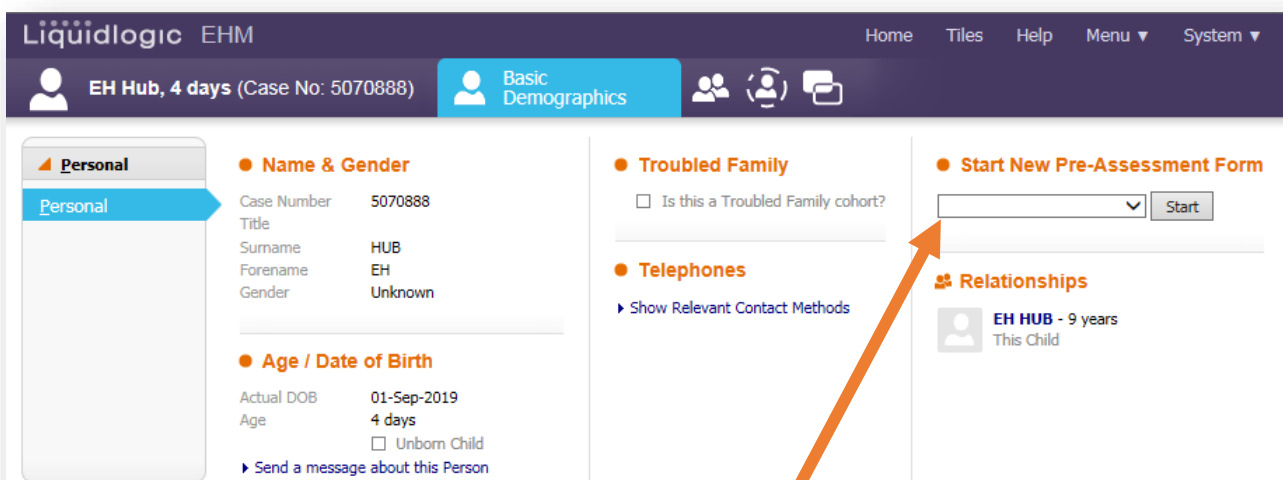
To complete the **Request Episode Creation** form…

- Open up the record of one of the children to be included in the EIS episode.
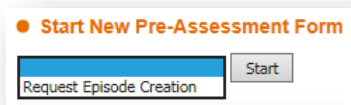
> ℹ️ If none of the children to be included in the EIS episode exist on the system open up our 'dummy' person record. You can do this by searching for case number **5070888**. This should bring up a record for a 'child' called EH (firstname) Hub (surname).
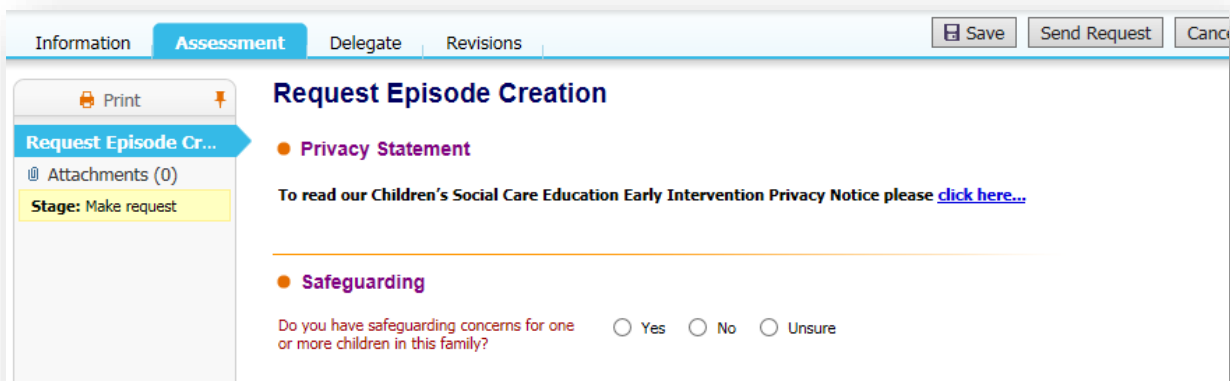
- You should now see the *Personal* demographics page for this record…

- To the right of the page, you will see a heading called ***Start New Pre-Assessment Form…***

- Click the drop-down arrow to see the options this list contains and select ***Request Episode Creation***…
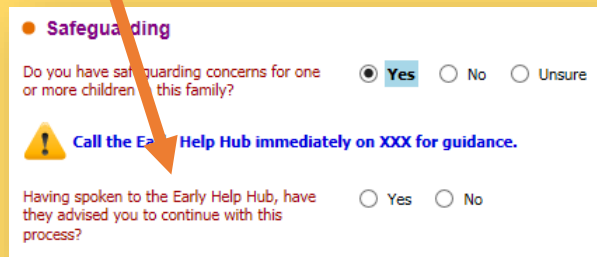
- Now click the *Start* button, the *Request Episode Creation* form should now appear…

- The first (and initially only) question you will see asks you whether you have any safeguarding concerns.

> If you answer **Yes** or **Unsure**, instructions will appear asking you to contact us immediately for guidance, as well as a question asking whether we advised you to continue with the form or not…
>
>
> If we told you to abandon the form, answer this question **No**. Instructions will then appear telling you how to cancel the form.

- Having answered the safeguarding questions, the **Consent** tab will appear…

- Enter the **Date of Consent Decision** and then what the **Consent Decision** was.

> Of course, as well as give consent, the family may decide to deny consent. Therefore the **Consent Decision** can be either to give or deny consent.
>
> If the selected **Consent Decision** does not give consent then instructions will appear asking you to contact us for guidance, as well as a question asking whether we advised you to continue with the form or not…
>
>
> If we told you to abandon the form, answer this question **No**. Instructions will then appear telling you how to cancel the form.

- If the *Consent Decision* was not to give consent (and you contacted us for guidance and we advised you to continue with your form), a box will appear asking you to explain why you're proceeding without consent…

- If the *Consent Decision* was to give consent, a question will appear asking you to confirm that you've attached a scanned/photographed copy of the family's signed consent form…
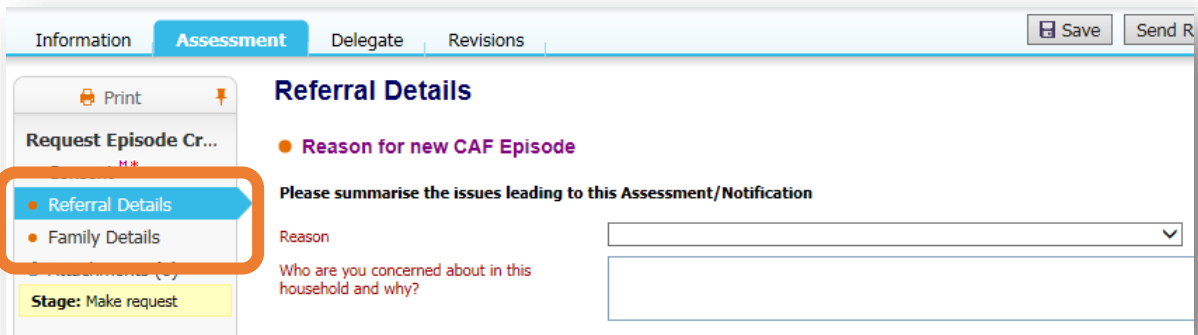
> If you're not sure how to attach a document to this form see the section **ATTACHING FILES TO FORMS** elsewhere in this guide for further information.
>
> If you need to download a copy of the consent form to print and get signed, there is a link in the message above the question.
>
> If you do not answer this question *Yes* you will not be able to continue with the form.
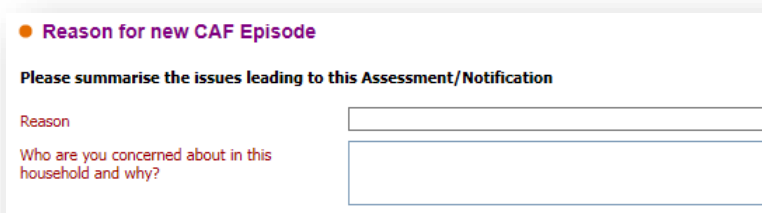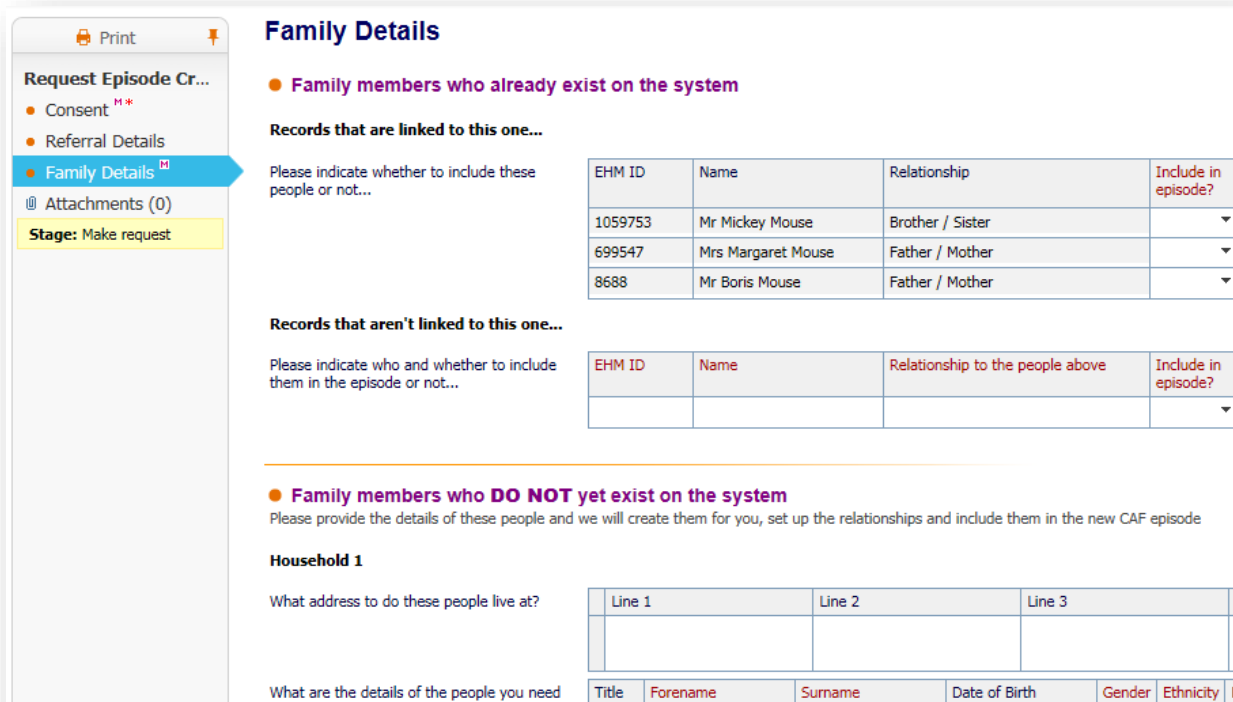
- Having answered the consents questions, the remaining tabs in the form will appear…

- On the *Referral Details* tab choose a reason for the episode and give some background…

- The *Family Details* tab is split into two main parts – the first refers to family members who already exist on the system, the second to family members who do not…

- Within the *Family members who already exist on the system* section there are two tables.

  o The first shows people who exist on the system and who are defined as having a family relationship with the child and looks like this…

> **i** In this table, you simply need to complete the *Include in episode?* column with a *Yes* or *No* to tell us whether to include them or not.

  o The second will be empty and is to allow you to list people who exist on the system but who have not appeared in the first table as they have no family relationship(s) defined…

> **i** In this table, you'll need to tell us the person's *EHM ID*, *Name* and their *Relationship to the people above* (i.e. the people in the first table), as well as answering the *Include in episode?* question. This allows you to tell us about missing family links, but for those people to not necessarily be included in the episode.

- Within the *Family members who DO NOT yet exist on the system*… section you will see this group of tables…

> If you have people that you'd like to include in the episode who don't already exist on the system (i.e. you haven't mentioned in the *People who already exist on the system* section) then this is where you can record them.

- o In the first table, enter the address that the first person you want setting up lives at.
- o In the second table, enter their details.
- o If there are other people who need adding who live at this same address you can click the ✚ icon on the far right-hand side of a row to add another row – you can add as many as you like.
- o If there are other people to add who live at another address, answer the *Do you need more people creating who live at a different address?* question *Yes* and another group of tables like above will appear for a second address. The form will allow you to specify upto 5 different addresses (households) in total.

- When you're finished, click the *Send Request* button in the top right-hand corner of the screen. Your request will then be sent to us to action.

- If your request is approved and we have no questions, you will receive a task that looks like this in your work-tray once we've actioned it…

> Click on the words *Request Episode Creation* to open the task. You will see the following…
>
>
>
> As the message says, you simply need to click the *Acknowledge Completion* button in the top right-hand corner of the screen.
>
> If you revisit the child's record you should now see the 🅴 flag against their name. You should also have a task in your work-tray to complete an *Early Help Assessment* for the child / family and the child should appear on your *Cases where I am the Episode Coordinator* tile on the *Tiles* page.

- If your request was refused or we have questions, you will receive a task that looks like this…

Click on the words *Request Episode Creation* to open the task. You will see the following…

Request Episode Creation

🔴 ⚠️ **Message from Early Help Hub**

We've been unable to complete your request for the following reason(s):

Please provide more information about why you are requesting this episode
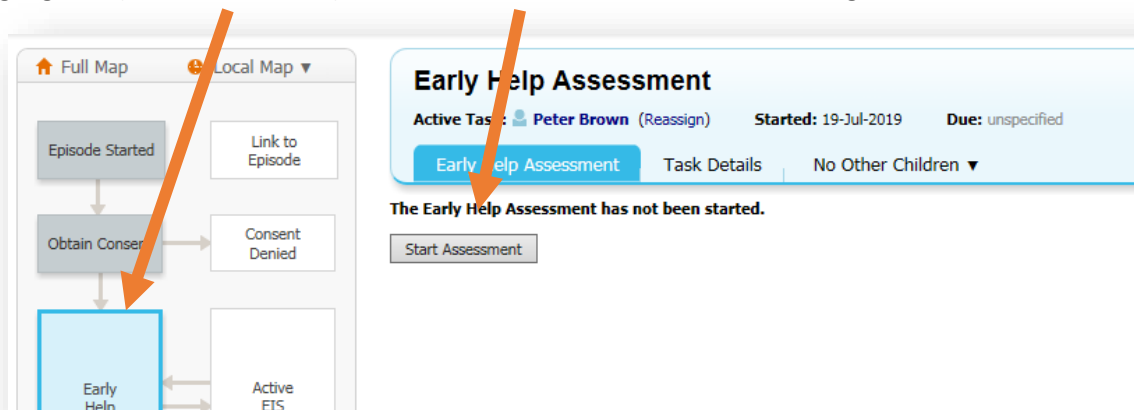
Please rectify this / these issue(s) and then click the **Send Request** button (top right)

Check the reason(s) we've given for rejecting your request. If it's something you can fix by updating the form, etc, do so and then click the **Send Request** button to try again.

If it's not something that can be fixed and there's no point in updating the form and resubmitting it to us, click the **Cancel** button. When prompted, enter the **Cancellation Reason** and then click **Confirm Cancellation**.
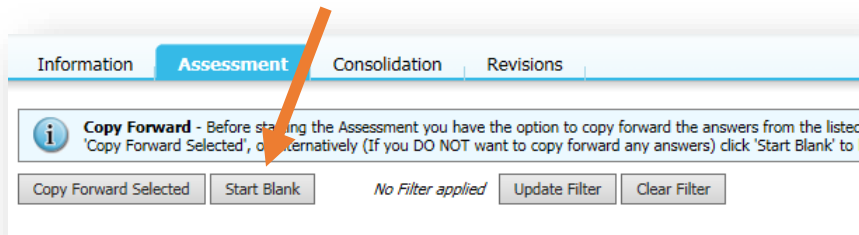
RECORDING AN EARLY HELP ASSESSMENT

- Open up the *Case Pathway* for the episode, it should look like this with the *Early Help Assessment* step highlighted (thick blue outline) and the *Start Assessment* button to the right…
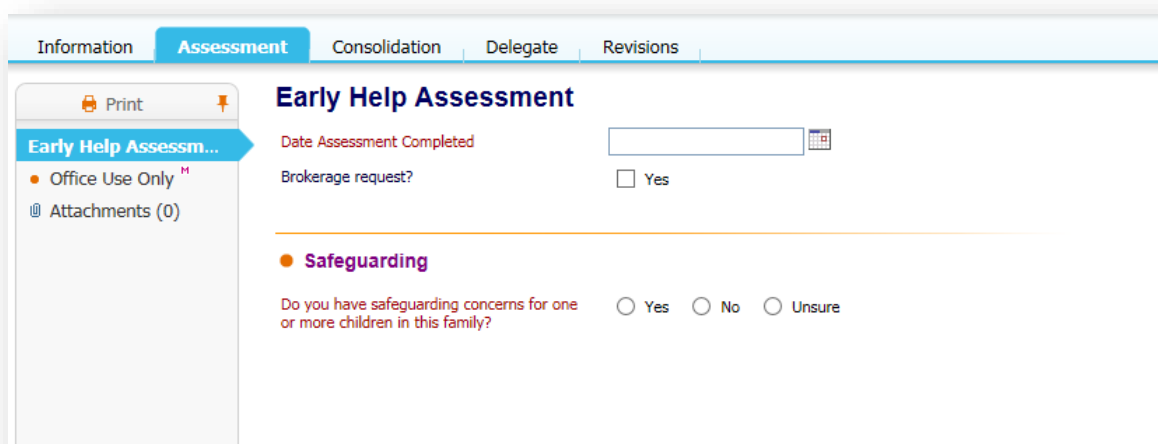
> **i** If it doesn't look like this, try clicking on the *Early Help Assessment* step to ensure it's selected. If that doesn't work get in contact with us – **earlyhelphub@hounslow.gov.uk** or call 020 8583 6653.

- Click on the *Start Assessment* button.

- On the next screen, click *Start Blank*…
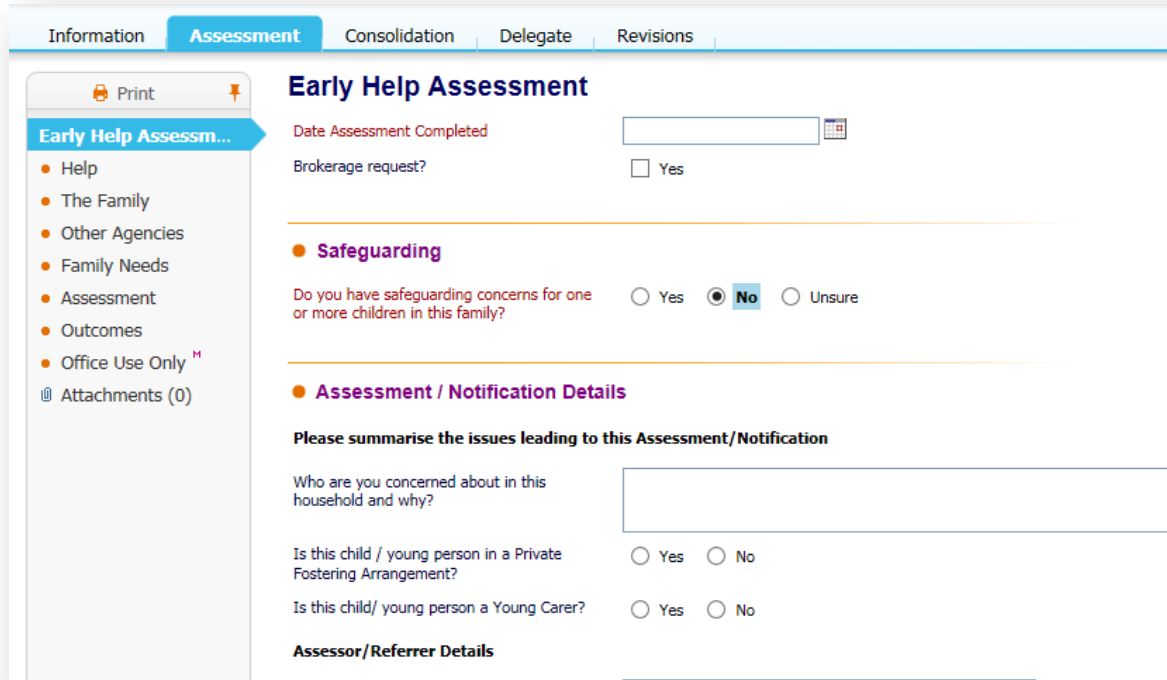
- The *Early Help Assessment* (CFAN) should now appear and look something like this…
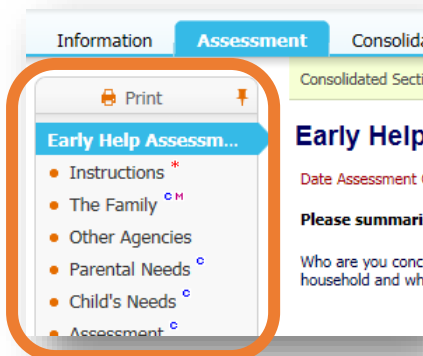
- Answer the question about Safeguarding and follow any instructions you see.

- Once answered, the rest of the form will appear and look something like this…

- Work your way through the assessment by clicking the tabs down the left-hand side of the screen…
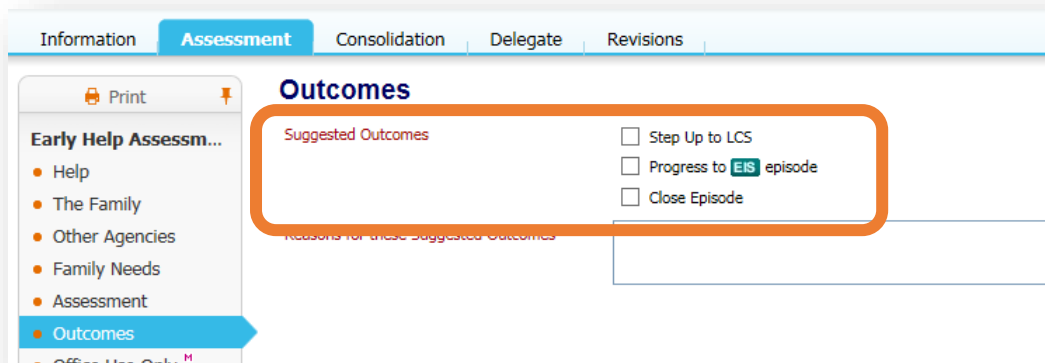
> **i** As with any computer system, we strongly recommend that you click the *Save* button in the top right-hand corner of the screen on a regular basis to ensure you don't inadvertently loose any work.

- By default, the assessment will ask you each question once only – even if you're completing an assessment for a group of two or more people. In doing so it assumes that the answer you give applies to everyone in the group. If you come across a question where you need to give a different answer for one or more people in the group you'll need to "ungroup" the question – see the section **UNGROUPING QUESTIONS** elsewhere in this guide for further information.

- On the final page (the *Outcomes* page) you will be given a list of *Suggested Outcomes* or next steps if you prefer…

- Make sure you tick the middle option i.e. *Progress to* EIS *episode* and then click the *Finalise Assessment* button.

> **ⓘ** Provided you ticked the *Progress to* EIS *episode* option, after you finalise the assessment the system will activate the ECAF episode for you.

> **ⓘ** If an ECAF episode already exists and you're revising (updating) the *Early Help Assessment,* you will not see the *Progress to* EIS *episode* option as it's not applicable (an episode already exists). Instead, you will see *Continue with episode* – chose that.

RECORDING A TAF MEETING

- To record a TAF Meeting you first need to activate this step. You can do this by clicking on the *Active EIS Episode* pathway step and then on the *Decisions* tab as shown below...
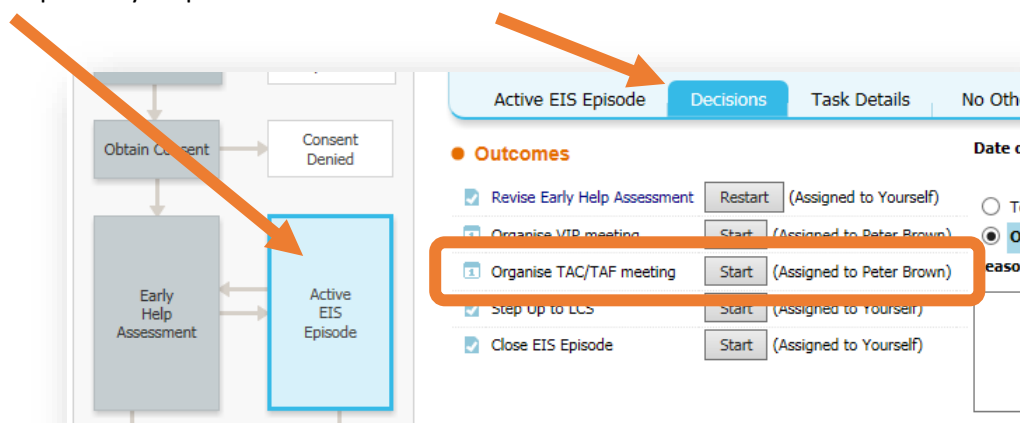
- In the list of *Outcomes* you will see *Organise TAC/TAF meeting* with a *Start* button to the right of it.

- Click on the *Start* button.
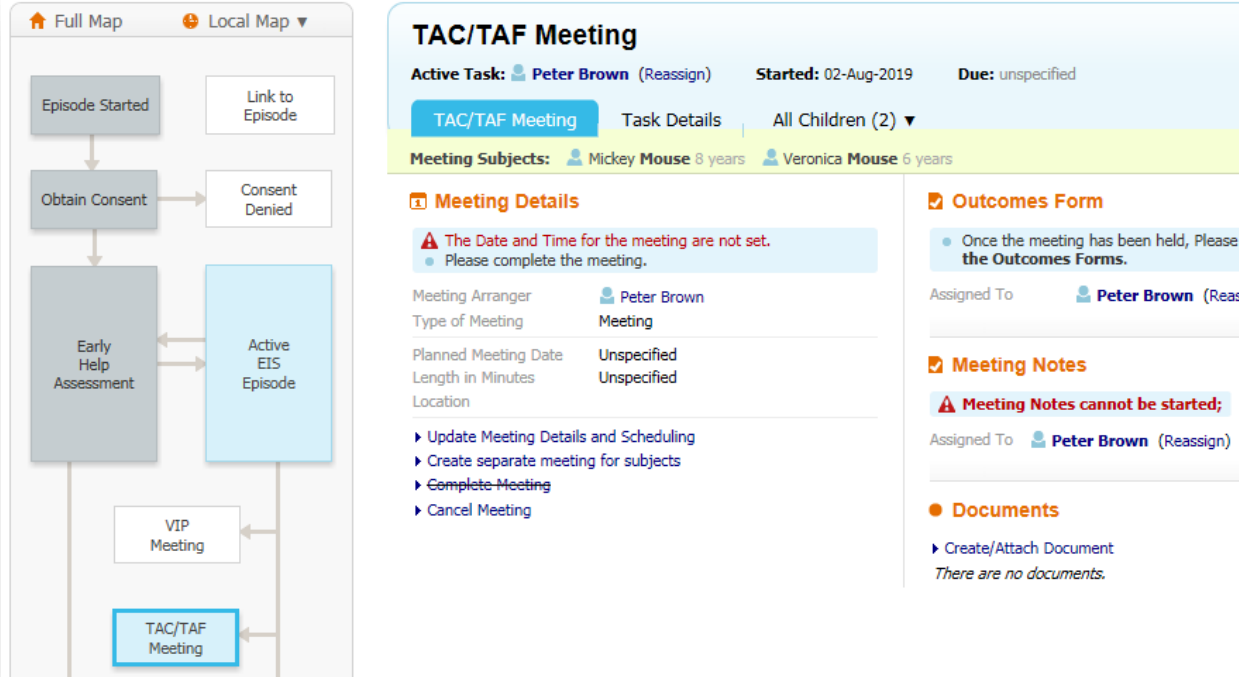
You can also do this by clicking on the *TAC/TAF Meeting* pathway step as shown below...
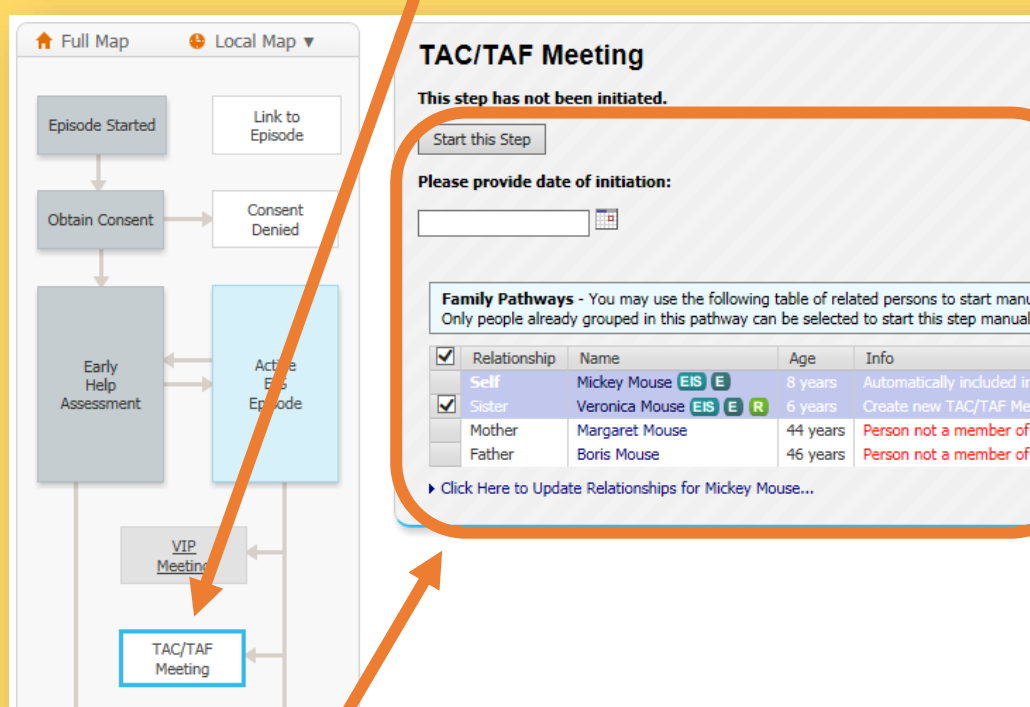
You should then see this screen, where you can enter the date of the meeting, choose which children it was about and then click the *Start this Step* button.

- You will now see the screen below…
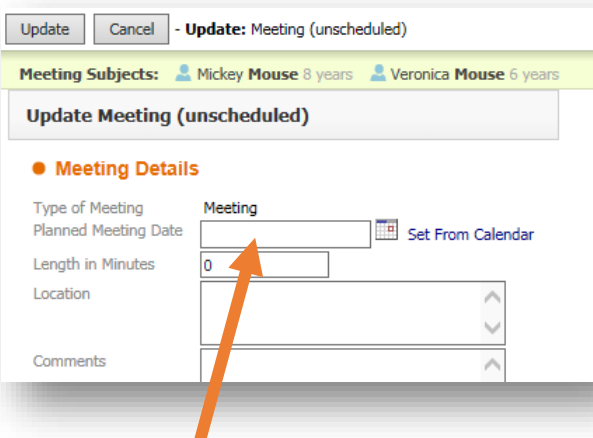
> **i** Recording a meeting is broken down into a few steps;
>
> - scheduling a date for it
> - recording the plan / outcomes
> - recording the minutes
>
> You can perform all of these steps in one go if you prefer e.g. you don't need to schedule the meeting in advance – you can do this retrospectively when you're recording the plan / outcomes and minutes.

Scheduling the meeting

- Click on the *Update Meeting Details and Scheduling* link – you will see the following screen…
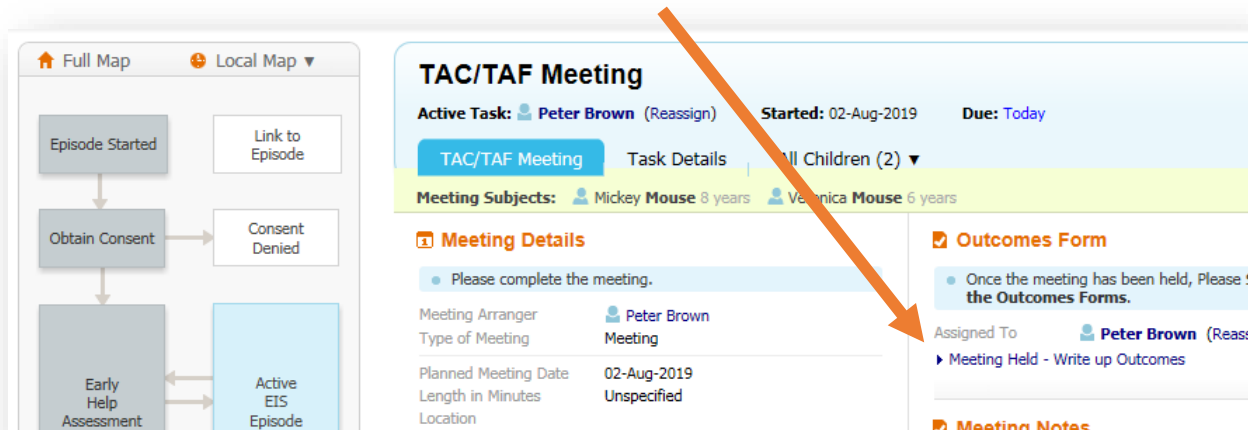
- Enter the *Planned Meeting Date* (the date that the meeting is / was originally planned to take place) and then click the *Update* button.

> **i** Other than *Planned Meeting Date*, you do not need to complete any of the other fields on this screen.

Recording the plan / outcomes

- Once you've scheduled the meeting, the *Meeting Held – Write up Outcomes* link with appear here…

- Click on this link

- You will be asked to confirm that the meeting has taken place – click the *OK* button.
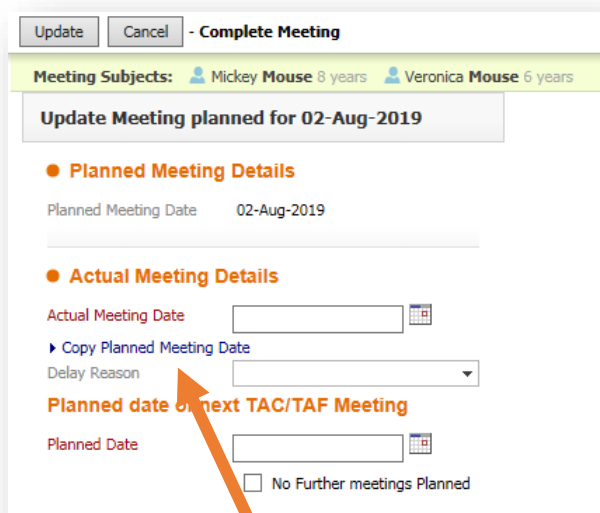
- You will now see the following screen…

- Enter the Actual Meeting Date i.e. the date the meeting actually took place, which might be different from the planned date.
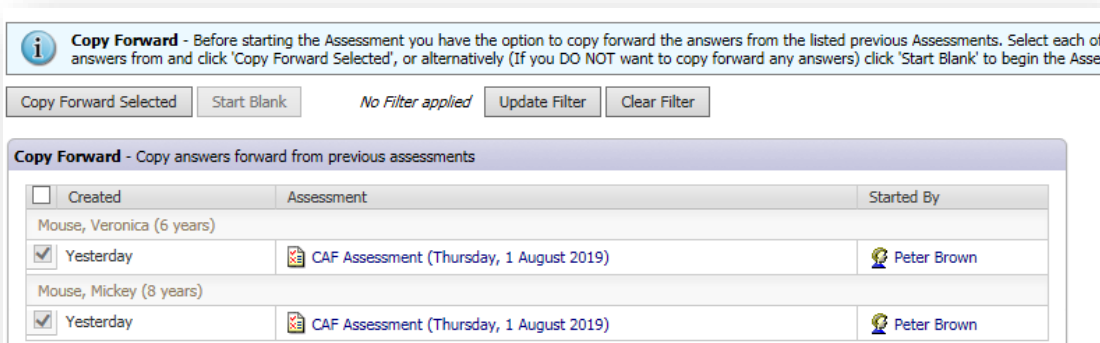
> If the meeting took place on the day it was planned to i.e. the actual meeting date was the same as the planned meeting date, you can simply click the *Copy Planned Meeting Date* link – this will automatically populate the *Actual Meeting Date* with the planned date.

- If another TAF Meeting has been scheduled, enter the date in the *Planned Date* field, otherwise tick the *No Further meetings Planned* box.

- Click the *Update* button.

> ℹ️ If the actual meeting date is after the planned meeting date the system may now ask you to choose a reason for the delay from the *Delay Reason* drop-down list.

- You will now see the *Copy-Forward* screen, click the *Copy Forward Selected* button…

- The *Plan / Outcomes* form will now appear…
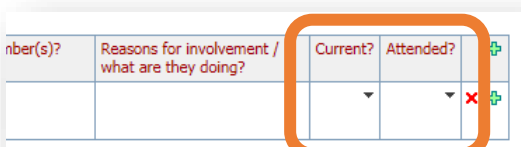
- Complete this first page with the details of the meeting venue and the attendees / team members.

- For each team member you will also need to indicate whether they're currently playing an active role in the team by choosing yes or no in the *Current?* column and whether they attended by choosing yes or no in the *Attended?* column…
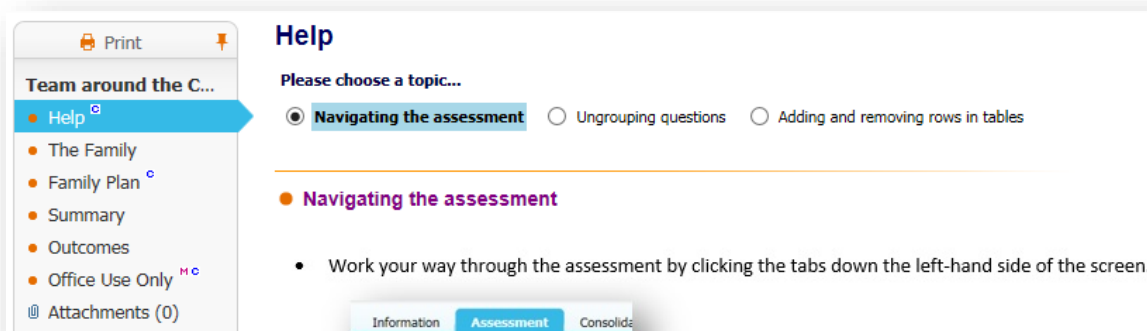
> ℹ️ If someone is no longer playing an active role in the team please do not delete their row from the table (by clicking the ✖ icon). Instead, just set *Current?* to *No*.
>
> If someone new joined the team and there isn't a blank row in the table where you can add record their details, click the ➕ icon to add a new row.
>
> By doing the above, this table will grow as the episode progresses, showing a full list of everyone who is actively participating or who has done so in the past.
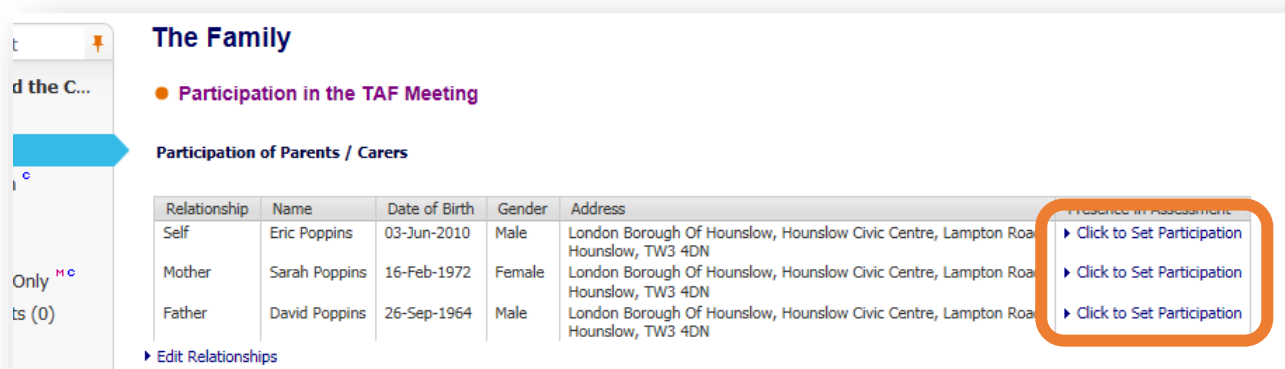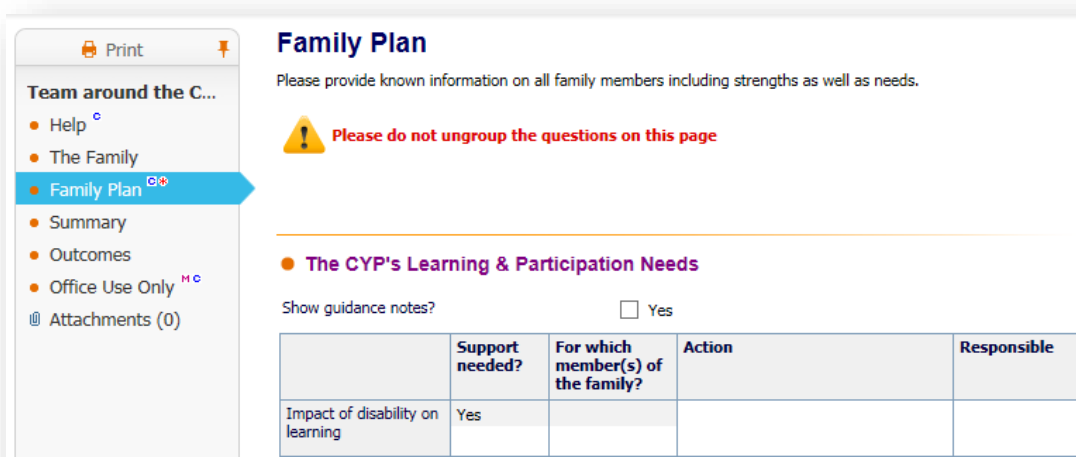
- The second page (named *Help*) contains some useful information for when working on forms. The content here is taken from this guide, but having it easily accessible from within the form should, we hope, make it easier for you.

- On the third page (named *The Family*) you will find details of the family members.

- For each of these people, indicate whether they attended the TAF meeting by clicking the *Click to Set Partication* link against their names…

- On the forth page (named *Family Plan*) you will find a series of tables showing the needs that were identified in the most recent assessment…
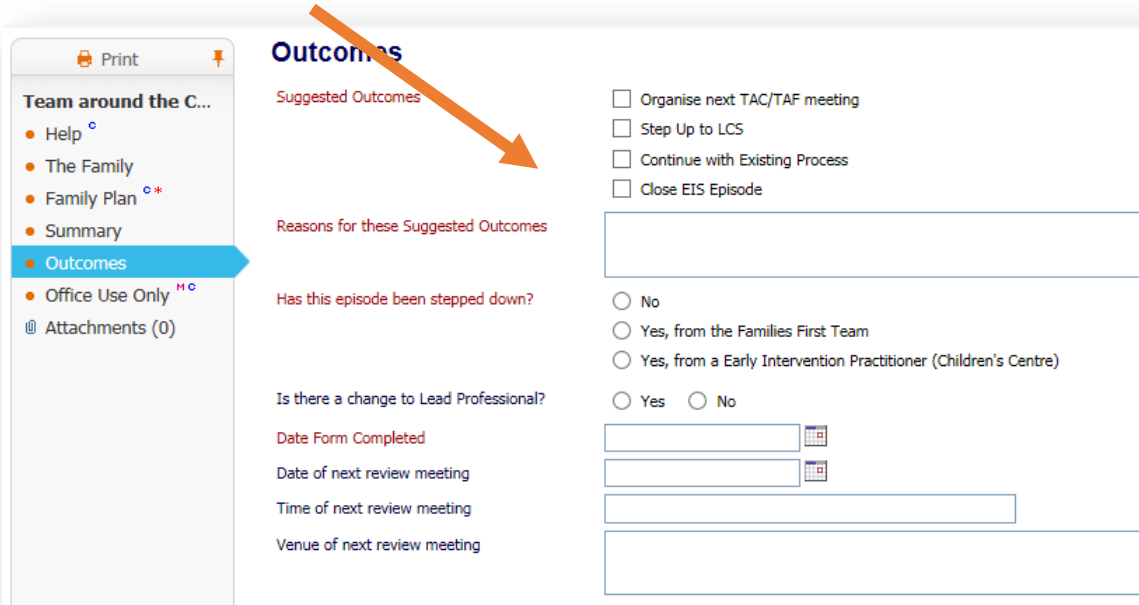
- Against each need you have a series of columns in which to record what actions are to be taken, who's responsible for carrying them out, by when and what the current status / progress is.

> If new needs have come to light since the original assessment, we can add these on for you if you let us know - earlyhelphub@hounslow.gov.uk or call 020 8583 6653.

- On the fifth page (named *Summary*) please write a summary of the plan and actions taken.

- On the final page (named *Outcomes*) please chose one or more outcomes…

- When you finalise the form, the system will do the following things depending on which outcome(s) you chose…

Outcome	What happens next
Organise next TAC/TAF meeting	The system will start the *TAC/TAF Meeting* step
Step Up to LCS	The system will start the *Step Up to LCS* step
Continue with Existing Process	The system will not start any new steps
Close EIS Episode	The system will start the *Close EIS Episode* step

> ℹ️ If you forget to chose an outcome at this stage don't worry, you can always start steps manually from the *Decision* tab on the *Active EIS Episode* pathway step…
>
>

STEPPING UP TO SOCIAL CARE

Stepping up to Social Care is basically referring / escalating an EIS Episode to the Children's Social Services team, usually becase there is a safeguarding issue.

> **IF YOU NEED SOCIAL CARE INPUT URGENTLY BECAUSE OF A SAFEGUARDING ISSUE YOU SHOULD ALWAYS CONTACT US BEFORE YOU EVEN CONSIDER DOING ANYTHING ON THE SYSTEM** - earlyhelphub@hounslow.gov.uk or call 020 8583 6653.

You can't actually step up to Social Care yourself. You will need to contact us to explain your rationnale for wanting to do so and we will then do this on your behalf.

If you accidentally trigger the *Set Up to LCS* step you will see this screen with the message *You do not have access to this stage in the application. Please reassign*…
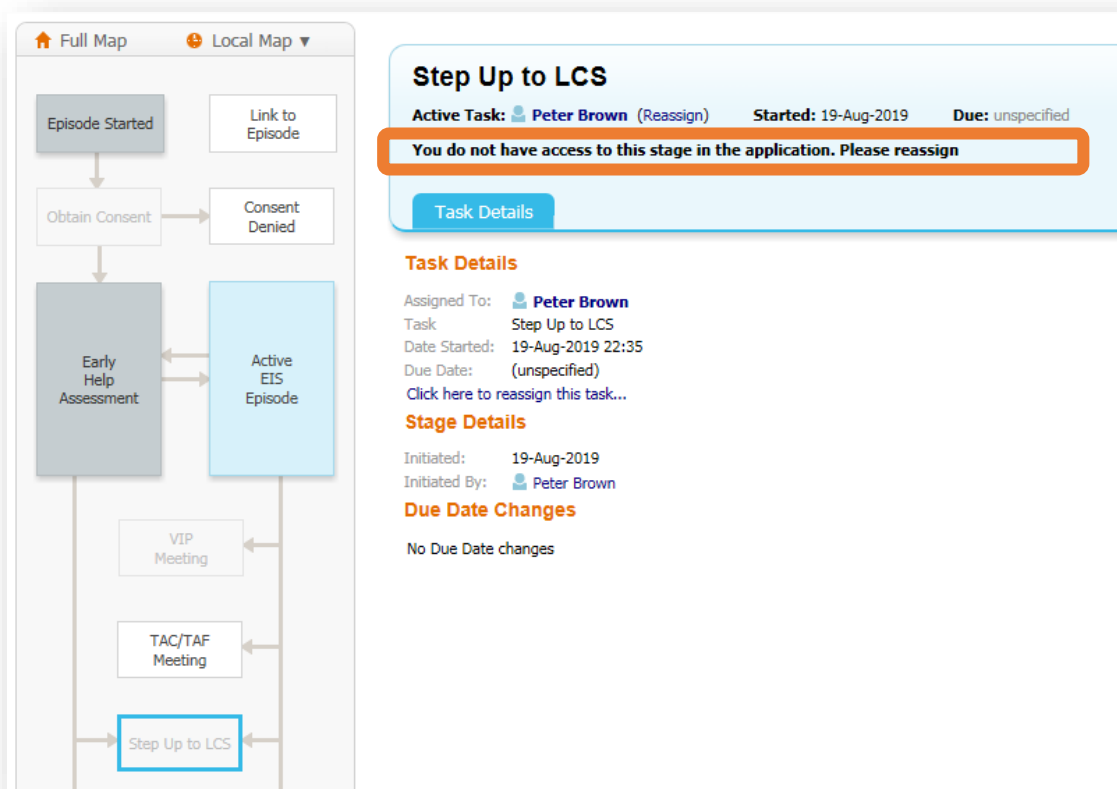
You should contact us and we will advise you who to reassign the task to. For more information on reassigning tasks see the section **REASSIGNING TASKS** elsewhere in this guide.
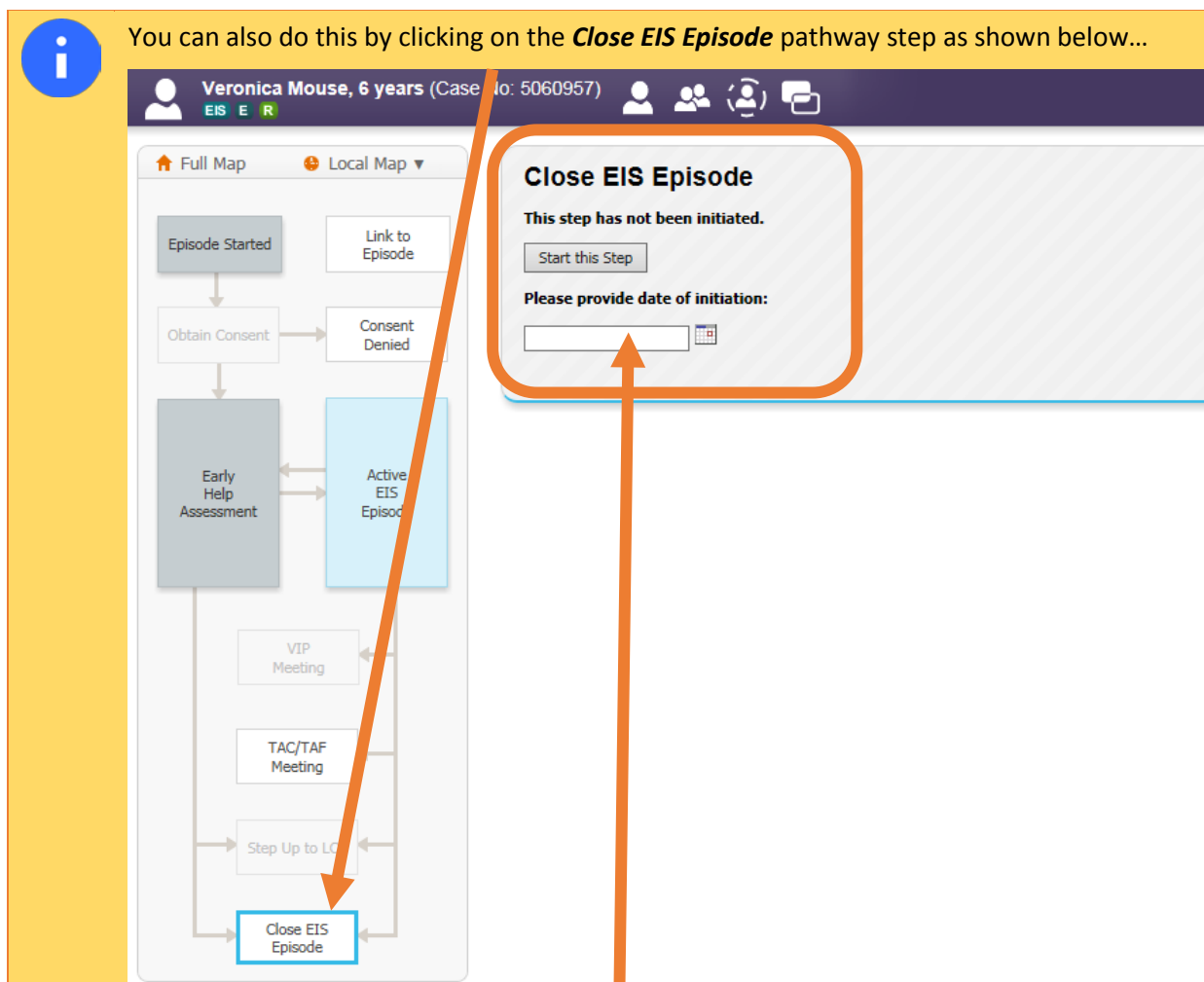
CLOSING AN EIS EPISODE

- To close an episode you first need to activate this step. You can do this by clicking on the *Active EIS Episode* pathway step and then on the *Decisions* tab as shown below...
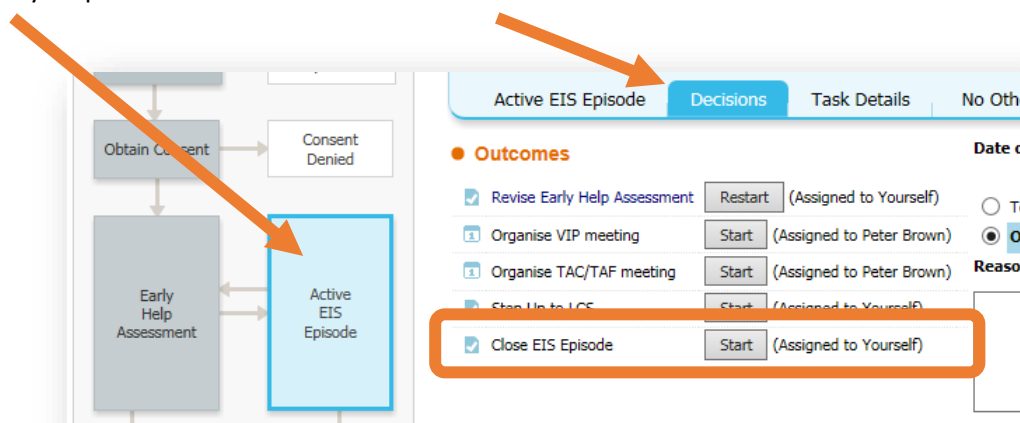
- In the list of *Outcomes* you will see *Close EIS Episode* with a *Start* button to the right of it.

- Click on the *Start* button.

You can also do this by clicking on the *Close EIS Episode* pathway step as shown below...
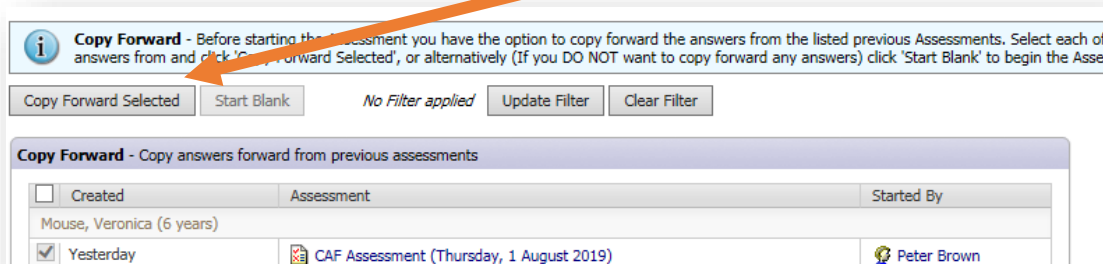
You should then see this screen, where you can enter a date for the closure and then click the *Start this Step* button.

- You will now see the screen below…
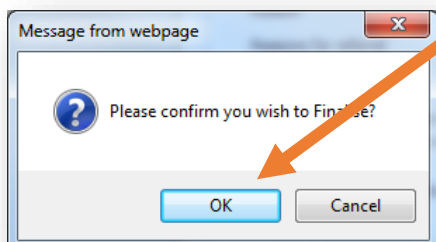
- Click on the *Start EIS Episode Closure* button…

- You will now see the *Copy-Forward* screen, click the *Copy Forward Selected* button…
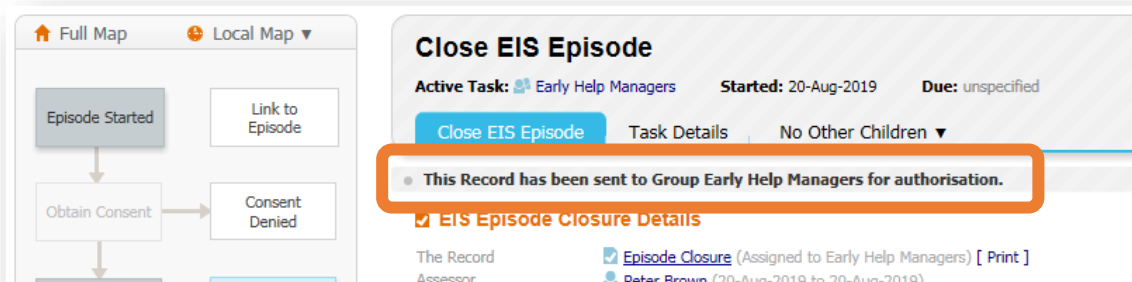
- The *Closure Form* form will now appear…

- Enter as many details as you can and when you're done, click the *Finalise Record* button.

- You will be asked to confirm that you want to finalise the form – click the *OK* button.

- You will be returned to the episode pathway where you will now see the following message confirming that your closure form has been sent to a manager for approval…

- You can now consider the episode closed.

If the manager checking your closure forms wants more information before they approve it they may reject your closure form and ask you for further information.
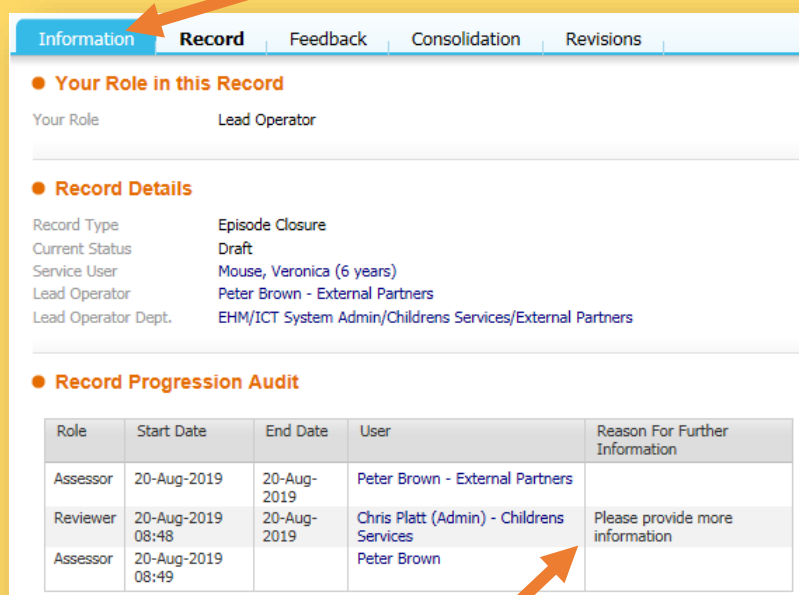
If this happens you will see a task like this in your worktray…

Take a note of the instructions in grey text to the right.

Click on the task to open the closure form, update the form with the requested information / as per the instructions and click *Finalise Record* again to send it back for approval.

If the instructions left for you are quite long and you can't quite read them all in your worktray, open the form and then click on the *Information* tab.

You will then be able to view the full text of the comment here.

When you're finished, click on the *Record* tab to the right of the *Information* tab to return back to the main form.

REASSIGNING TASKS

Reassigning tasks means sending them to another user or team to deal with. There are a few ways to do this in EHM. Each way looks slightly different but they essentially do the same thing – ask you who to send the task too and whether you want to send them an accompanying note / explanation as to why you're sending it to them.

From a Pathway Step…

- On a pathway step you will normally see the **_Reassign_** link alongside your name at the top of the screen as shown below…
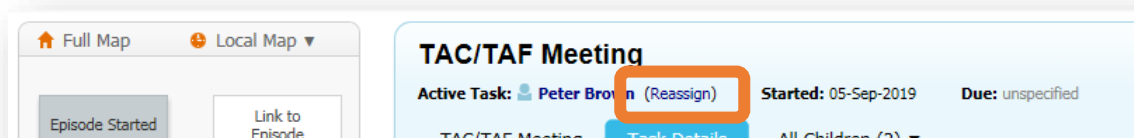
- Clicking on this will bring up the following window…
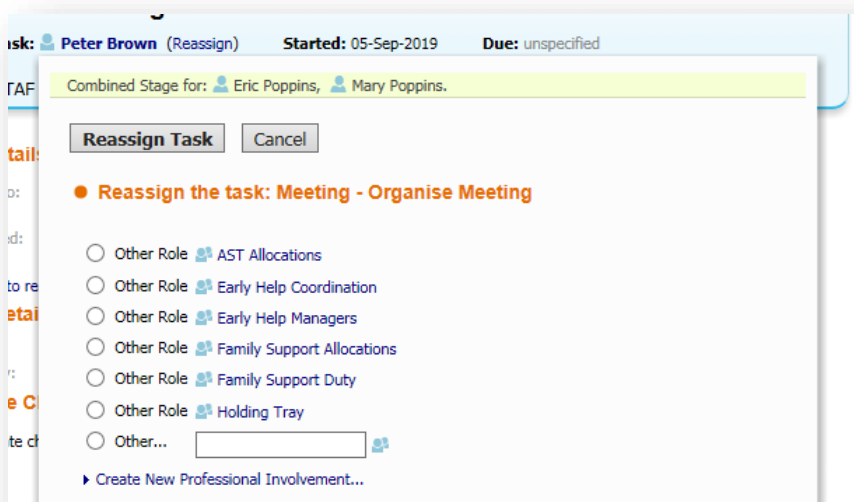
> ℹ️ The system will suggest people/teams that it thinks you might want to reassign the task to, but will also give you an **_Other…_** option in case they're not listed.

- If the person/team you're looking for is shown in the list of suggestions, select it e.g…
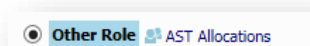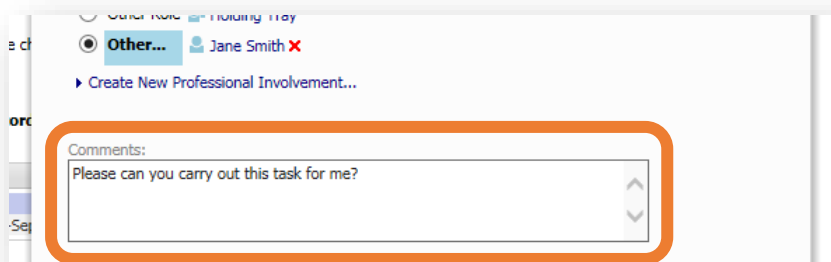
- Otherwise, start typing the person/team name in the text box to the right of the **_Other…_** option e.g…
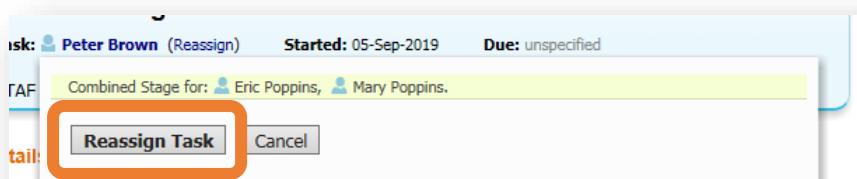
> ℹ️ A list will appear beneath the text box of people/teams on the system that match what you've typed so far (this will update with each character you type). When you see the name of the person/team in the list, simply click on it.

- Once you've chosen the person/team, enter a comment in the **Comments** box at the bottom of the screen (optional)…
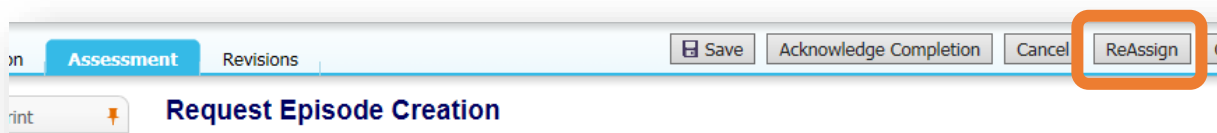
- Then to finish off, click the **Reassign Task** button at the top of the window…
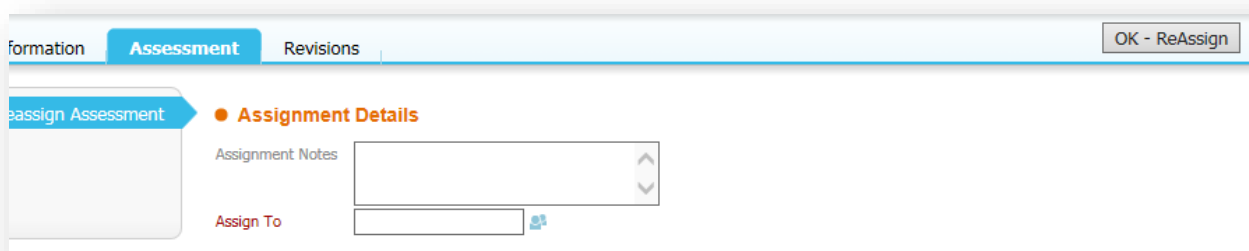
From a form / assessment…

- Depending on which form/assessment it is you may find a **Reassign** button within a form or assessment like this…

- If you click on this you will see the following screen..

- As with example above, you can write a note for the person/team you're sending the task to (in the **Assignment Notes** field)

- You don't however get any suggestions of people/teams you might want to send the task to, the only option you have is to type the person/team name (in the **Assign To** field).

> As above, the system will show you a list of people/teams in the system that you can chose from based on what you've typed in. When you see the person/team you're looking for in that list, click on it.
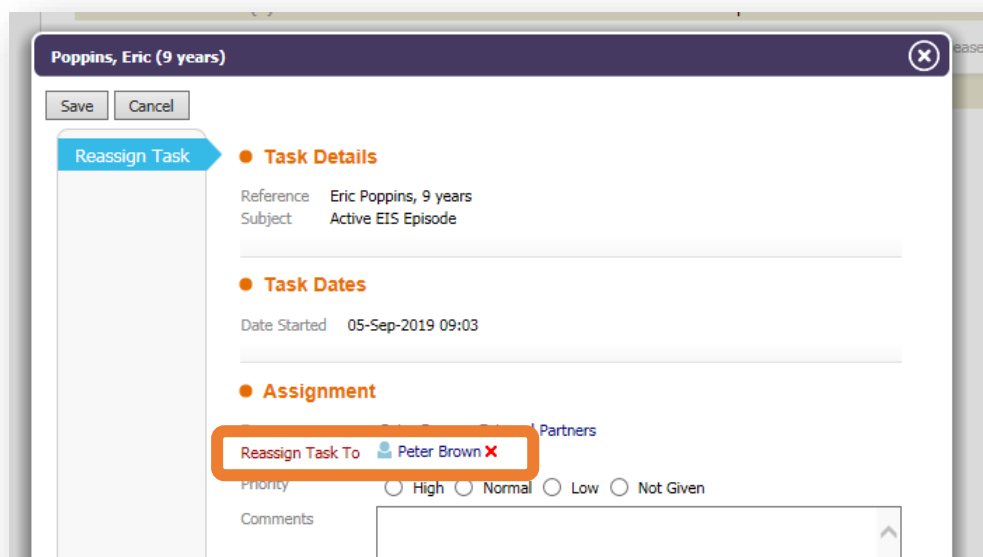
- When you're ready, click the **OK – ReAssign** button in the top right-hand corner of the screen.

From your work-tray…

- If you hover your mouse over a task in your work-tray you should notice a spanner icon appear against it on the right-hand edge of the screen…

- When you click on this icon the following window will appear…
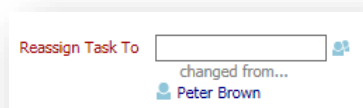
- Where it says ***Reassign Task to*** followed by your name, click on the red cross (✘).

- You should now see the following…

- Type the name of the person/team name into the ***Reassign Task To*** field…
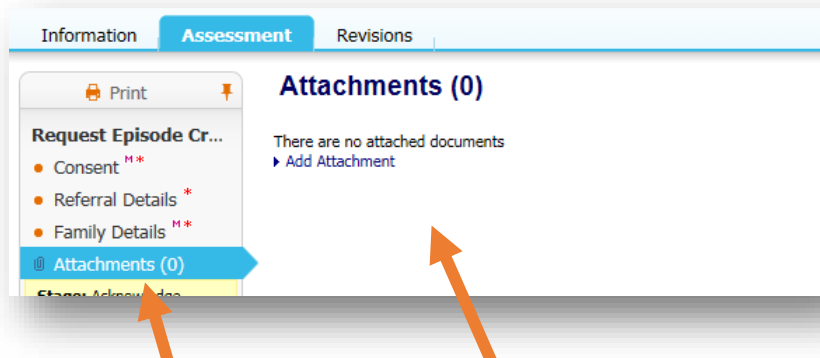
> ⓘ As above, the system will show you a list of people/teams in the system that you can chose from based on what you've typed in. When you see the person/team you're looking for in that list, click on it.

- Type a comment / note for the receiver in the ***Comments*** box beneath (optional)

- When you're done, click either of the ***Save*** buttons in the top and bottom left-hand corners of the window.

ATTACHING FILES TO FORMS

Sometimes you will have Word, Excel, PDF or picture files that are relevant to a form you're completing on EHM. For example, a photo or scan of a signed consent form. You can attach these files to forms in EHM, much like you'd attach them to an e-mail. Here's how…

- Open the form you want to attach the file(s) to…
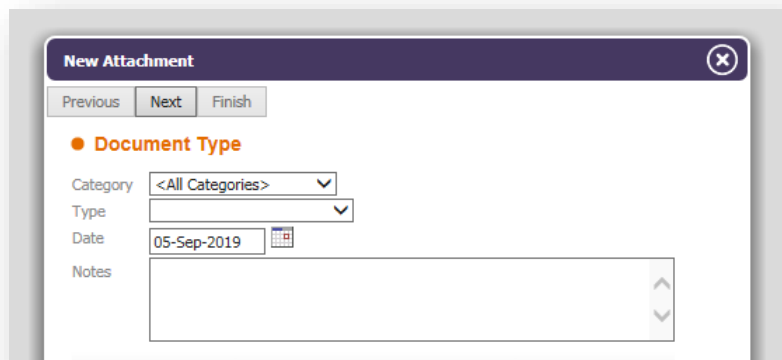
- Click on the **Attachments** tab
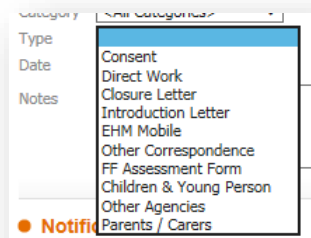
> **i** Any files that have already been attached to this form will appear in a list here

- Click on the **Add Attachment** link, the following window will appear…
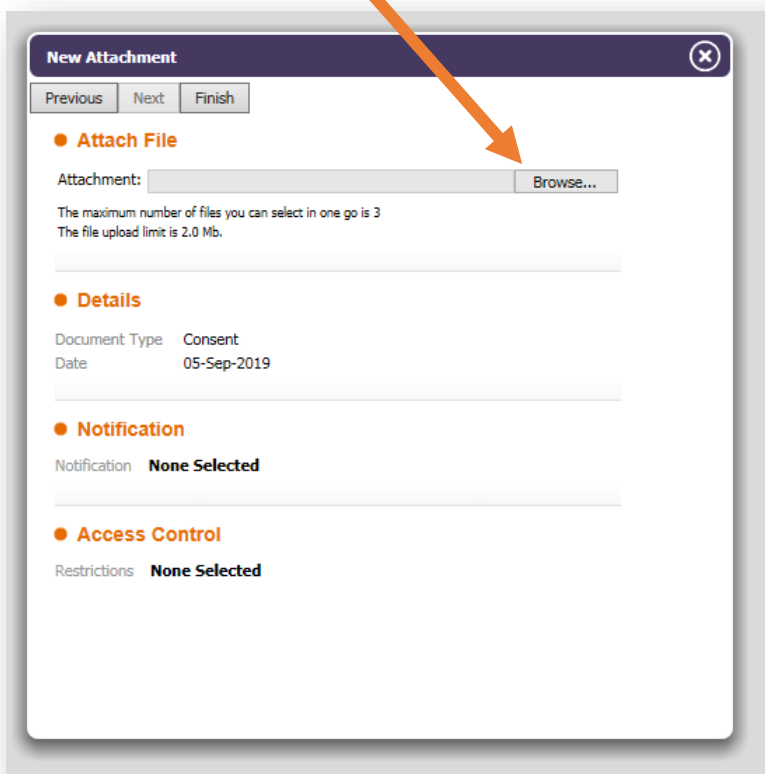
- Choose the type of document you're attaching from the Type drop-down list e.g….

- Add some notes / description of what the attachment is in the **Notes** field (optional)

- Click the **Next** button

- On the next screen, click the *Browse…* button…
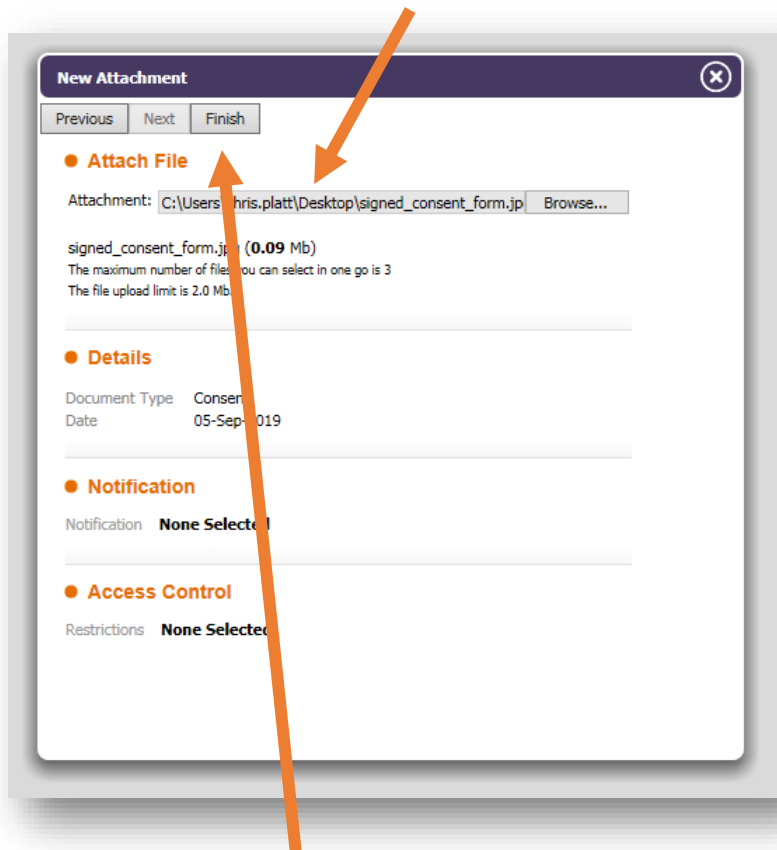
- Locate and select the file from wherever you saved it on your computer…
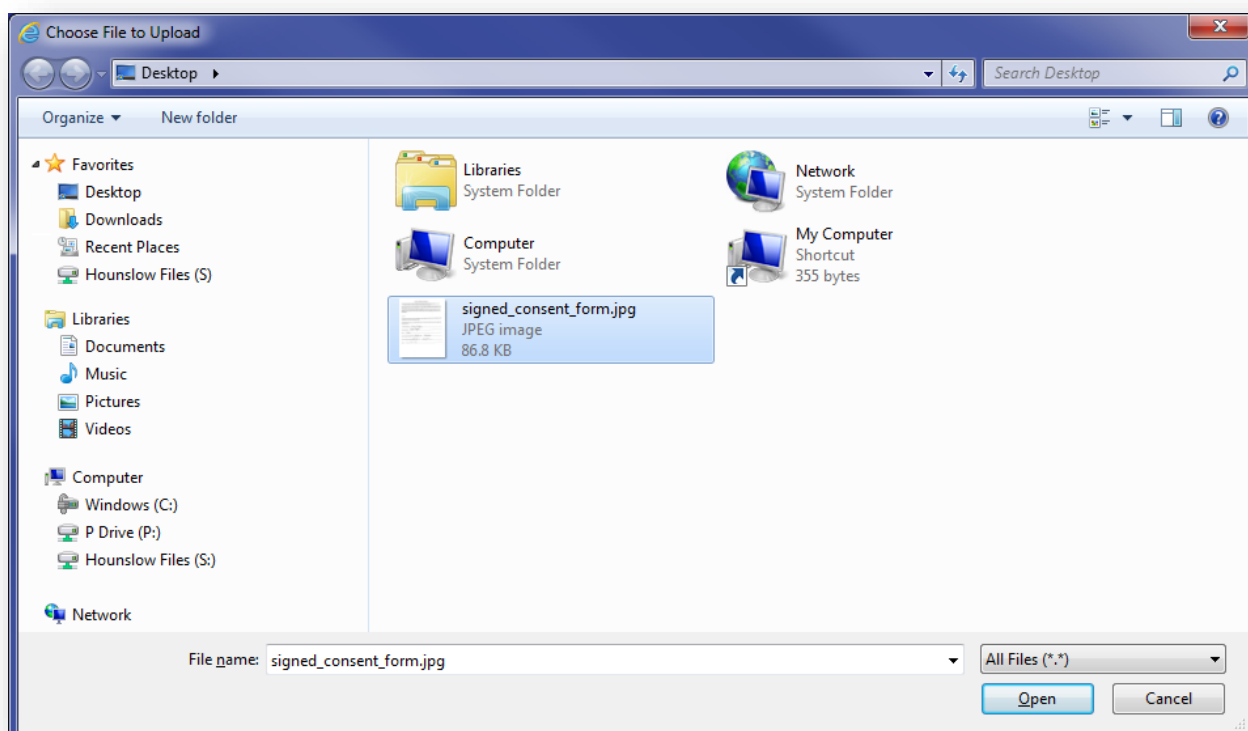
- The location of the file on your computer should now be shown in the *Attachment* box…
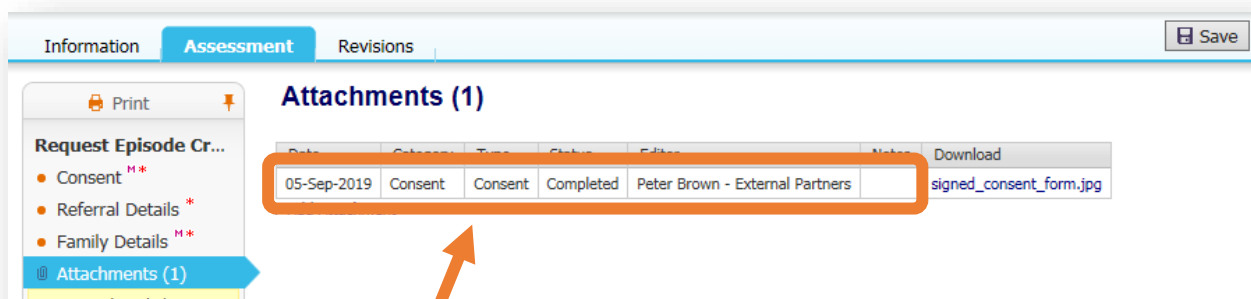
- When you're done, click the *Finish* button.

- You will now see the file listed as an attachment on the *Attachments* tab of the form…
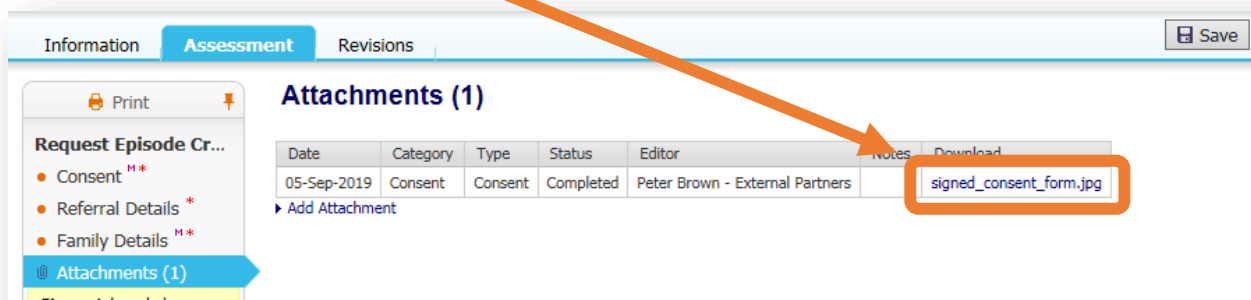
- To view information about the attachment (for example, who attached it and when) click anywhere here..

- To view the attachment itself click here…
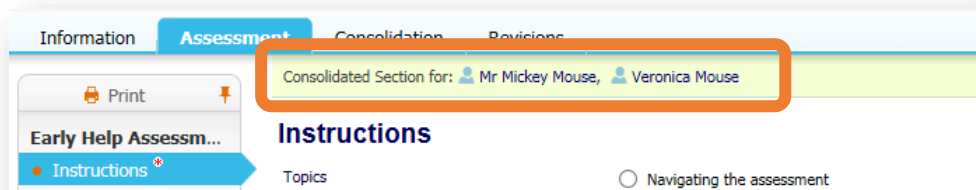
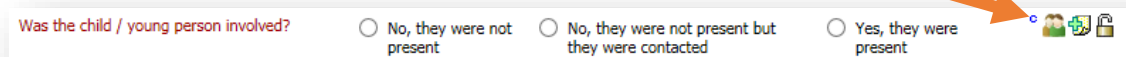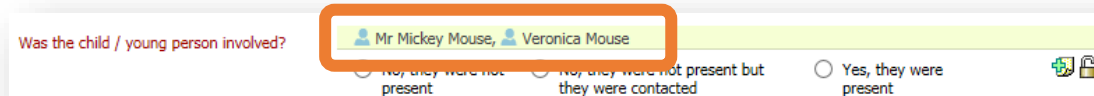## UNGROUPING QUESTIONS

- If you are completing a form for a group of people you may see a banner like this at the top of each page / section…
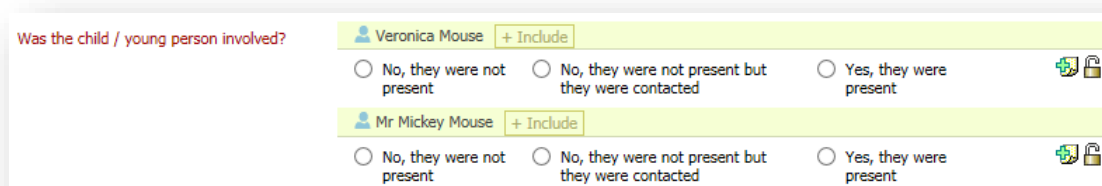

- This means that for each question in that page / section the system will assume that the answer you give applies to all of these people.

- Occasionally though, you might come across a question where you need to give a different answer for one or more people in the group. To do this, you'll need to "ungroup" the question.

- To "ungroup" a question, you need to click the 👥 icon to the right of it…

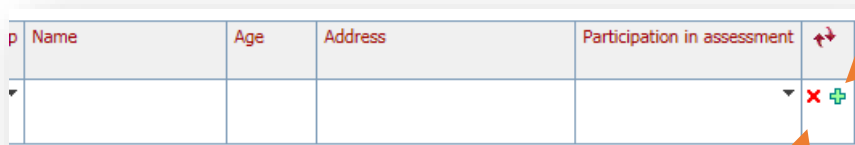- The names of the people in the group will then appear directly above the answers…

- Click on the name of the person you want to "ungroup" e.g. give a separate answer for.

- You will then be able to give different answers for each person…

ADDING AND REMOVING ROWS IN TABLES

- If you need to add a row to a table, click on the ➕ icon on the right-hand side of an existing row...

p	Name	Age	Address	Participation in assessment	↵
▾				▾	✕ ➕

- A new, empty row will be inserted into the table directly below.

- To delete a row from a table click the ✕ icon to the left of the ➕ icon.