Delegate Case File Audit Actions

- 1. Start and complete Case File Audit as normal
- 2. In the Actions section, choose outcome as required and click Finalise Assessment

Information Assess	ment Consolidation Revisions	J	Gave Finalise Assessment Car	ReA	ssign Close					
🔒 Print 🕴	20. Overall Rating of Case Audit	Feedback: Good Practice	Feedback: Things for improvement		* 😼 🔓					
BEXLEY CHILDREN'		Good Practice go here	Improvements go here	× +						
Child/Young Perso										
Actions RequiredAttachments (0)	Rating	$\bigcirc 0 \bigcirc 1 \bigcirc 2 \bigcirc 3 \bigcirc 4 \bigcirc 5 \bigcirc$	6 0 7 0 8 0 9 0 10							
	Feedback from the Child / Family									
	Date of Contact	22-Feb-2018								
	Name of child /family member	Name of child /family member go here								
	What is going well? What could be done d	ifferently? Has it made a difference?								
	Feedback comments go here									
	Actions									
	Are any actions required as an outcome of this case file audit?	💓 Yes 🔿 No			* 🖏 🔓					

3. Click the Delegate tab

Information Assessment	Consolidation	Delegate	Revisions	🗄 Sar	ve Finalise Ass	sessment	Cancel	ReAssign	Close
🔒 Print	Ŧ	Assessme	nt Section	Delega	tion				
BEXLEY CHILDREN'S SOCIAL C	Yourself 🖻	List of contributors	involved in completing	ng this Asses	sment (Past & Pres	ent):			
Child/Young Person & Family De	Yourself 🔛	Contributor	Date Assigned 🔺	Due Date	Date Completed	Status	Department		
 Actions Required 	Yourself 🖻	Active							
Attachments (0)	Yourself 🖻	1 💄 Theo Tay	23-Feb-2018			Active	Bexley Root		
		Add New Contributor							

4. Select Actions Required tab

Information Assessment	Consolidation	Delegate	Revisions	🔒 Sa	ve Finalise Ass	sessment	Cancel	ReAssign	Close
🔒 Print	Ŧ	Assessn	nent Section	Delega	tion				
BEXLEY CHILDREN'S SOCIAL C	Yourself 🖻	List of contribut	ors involved in completi	ng this Asses	sment (Past & Pres	ent):			
Child/Young Person & Family De	Yourself 🖻	Contribute	or Date Assigned 🛦	Due Date	Date Completed	Status	Department		
Actions Required	Yourself 🖻	Active							
Attachments (0)	Yourself 🖻	1 🚨 Theo T	ay 23-Feb-2018			Active	Bexley Root		
		Add New Cont	ributor						

5. Click Add New Contributor link

Information Assessment	Consolidation	Delegate	Revisions	🗄 Sa	ve Finalise Ass	sessment	Cancel	ReAssign	Close
🔒 Print	Assessment Section Delegation								
BEXLEY CHILDREN'S SOCIAL C	Yourself 国	List of contributors	involved in completi	ng this Asses	sment (Past & Pres	ent):			
Child/Young Person & Family De	Yourself 🖻	Contributor	Date Assigned 🔺	Due Date	Date Completed	Status	Department	1	
Actions Required	Yourself 🖻 🔷	Active							
Attachments (0)	Yourself 🔽	1 🚨 Theo Ta	y 23-Feb-2018			Active	Bexley Root		
		Add New Contributor							

6. Complete the Delegation section and click Confirm

Information Assessment	Consolidation	Delegate Revisions Finalise Assessment Cancel ReAssign Close
Print Print BEXLEY CHILDREN'S SOCIAL C Child/Young Person & Family De Actions Required Attachments (0)	Yourself Yourself Yourself Yourself Yourself	December Revisions Assessment Section Delegation What to do: First select the Assessment sections that you wish to delegate. Then select the user, department or workgroup to whom you want to delegate the sections you have selected. Provide a 'Due Date' if you wish and then add any comments into the 'Notes for Operator' box. Click the 'Confirm' button when you are finished. Confirm' Retract from Operator Cancel New 23-Feb-2018 16:36 by Active Assessor Social Worker1 × Due Date 28-Feb-2018 Notes for Assessor Notes go here

7. Click Ok



8. Click Save and Delegate



Note: The Actions Required section will now show the delegate's name

Information Assessment	Consolidation	Delegate	Revis	ions	Save F	inalise Assessmen	t Can	cel ReAssign	Close
🔒 Print	Ŧ	Assess	ment	Section Del	egation				
BEXLEY CHILDREN'S SOCIAL C	Yourself 🖻	List of contrib	outors involv	red in completing this	Assessment (P	ast & Present):			
Child/Young Person & Family De	Yourself 🖻	Contrib	utor	Date Assigned 🔺	Due Date	Date Completed	Status	Department	
Actions Required Social	l Worker1 🖻	Active							
Attachments (0)	Yourself 🖻	1 Social 2 Add New Co	o Tay al Worker1 ontributor	23-Feb-2018 23-Feb-2018 16:36	28-Feb-2018		Active Active	Bexley Root UAT Test Team	