



**CCM Guide to  
Recording  
Plans, Needs & Reviews**

# Recording a Plan

Make sure you are in the record of the Child you want to record the Plan against

- **Plans** – Side Bar Menu
- **Plans** – Sub Menu
- **Add Plan Button** - (if a plan has been stepped up/down, CCM allows you to copy from a previous plan)
- Select **Plan Type** – i.e. **CIN/LAC**

## Starting a Plan

**Plan Details**

Copy from a previous plan for this client? Yes  No

Plan Type\*

What is the planned start date of the plan?

When will the plan be made operational?

What is the main aim of the plan?

Overall aim of the plan including timescales

Team Responsible

Select '**Plan**' type; enter '**Start/Operational**' date along with '**Aims**' & Overall aim of the '**Plan**' including timescales.

Enter '**Planned Start Date**' of the '**Plan**'.  
Enter the Date when the '**Plan will be made Operational**'.

Select from the drop down '**What is the main aim of the Plan**'.

Find the '**Team Responsible**' & state whether the subject was seen. '**THEN SAVE**'

This plan can be copied to siblings after it has been saved

**Involvements**

0 Records

Name	Roles or Relationship	Contact Number	Discussed?	Agree?	Comments	More	Unlink
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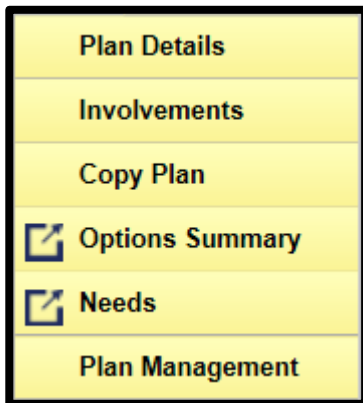
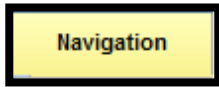
There are 5 records available to link to the plan

Once the '**Plan**' has been fully completed only **then** you should copy over to siblings.

The Navigation icon can be found at the top right of the **'Plan'** screen.

Within the **'Navigation'** dimensions are the screen shots below.

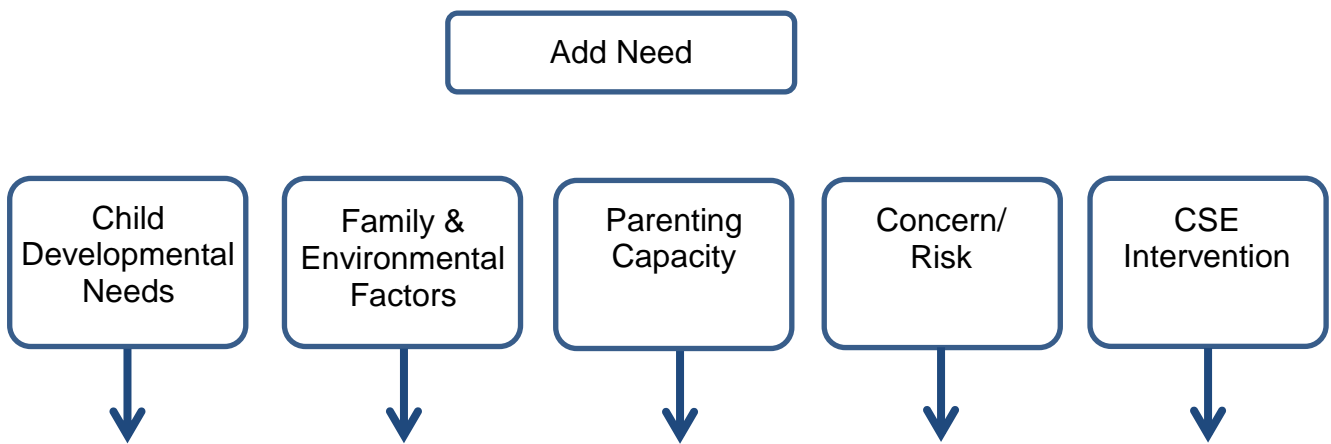
Each Plan dimension is slightly different i.e. CIN, LAC & CP. (below are the dimension for a CIN Plan).



- **Plan Details** – (Front sheet of the Plan)
- **Involvements** – (Whos' involved with the Plan)
- **Copy Plan** - (Copying Plan to Siblings')
- **Option Summary** - ( Overview of Needs added to the Plan)
- **Needs** - (Here Planned Actions/Outcomes are recorded)
- **Plan Management** – (Ending of Plan)

## ADDING NEEDS:





**Description:**

When recording a 'NEED' describe the need & any issues that may have been discussed along with the date the need was identified & required date.

**Health:** Jonny was diagnosed with epilepsy by a paediatric consultant at Queens Hospital in September 2015. Since then he has had 3 seizures which has ended in him being admitted to hospital. The diagnosing consultant at Queens referred Jonny to GOSH for treatment and monitoring. Health professional feel that Jonny's epilepsy can be managed through treatment at GOSH but Jonny has missed all three of his appointments from October to present.

**Education:** Jonny's school attendance is at 43% for this term. The school have reported that Jonny is significantly behind his peers in maths, language skills, and stated that he reads at a year 1 level. The educational psychologist has noted that Jonny has a speech delay. The school have recommended and offered extra tuition for Jonny but this has not been taken up. The educational psychologist has made a referral to a speech therapist but Jonny has not attended any of the four appointments.

Jerry has school attendance of 55%. School estimate that he is nearly 3 years behind his peers in maths and literacy.

**Identity:** Jonny and Jerry present as unkempt. The school note that both often smells of urine. The school have reported that Jonny and Jerry have become increasingly isolated and that they have few friends. Jonny has reported to me that he tries to make friends but he classmate tease and bully him. Jonny said this makes him sad.

Jerry reported feeling angry at "everyone" and said that he hates his classmates at school. Jerry was previously isolated at school but has recently started several fights and was excluded temporarily on 2 occasions in the past month.

**Needs**

No records to display

Need	Identified Date	Priority	Required By Date	No Long Required
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**Needs Linked to the Plan**

0 Records

View Details	Need Group	Need	Description	Identified Date	Count of Other Plans	Count of Assess	Not Required Date	Not Required Reason	Action Required	Unlink	Delete
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There are 9 records available to link to the plan

Need\*

Description\* 

Health: Jonny was diagnosed with epilepsy by a paediatric consultant at Queens Hospital in September 2015. Since then he has had 3 seizures which has ended in him being admitted to hospital. The diagnosing consultant at Queens referred Jonny to GOSH for treatment and monitoring. Health professional feel that Jonny's epilepsy can be managed through treatment at GOSH but Jonny has missed all three of his appointments from October to present.

Identified Date\*

Required By Date

Not Required Date

Action & Outcomes Required

OK will save any unsaved changes in all the need related sections below. Cancel will discard any unsaved changes in those sections.

**Needs Linked to the Plan**

0 Records

View Details	Need Group	Need	Description	Identified Date	Count of Other Plans	Count of Assess	Not Required Date	Not Required Reason	Action Required	Unlink	Delete
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There are 9 records available to link to the plan

Need\*

Description\* 

Health: Jonny was diagnosed with epilepsy by a paediatric consultant at Queens Hospital in September 2015. Since then he has had 3 seizures which has ended in him being admitted to hospital. The diagnosing consultant at Queens referred Jonny to GOSH for treatment and monitoring. Health professional feel that Jonny's epilepsy can be managed through treatment at GOSH but Jonny has missed all three of his appointments from October to present.

Identified Date\*

Required By Date

Not Required Date

Action & Outcomes Required **38638**

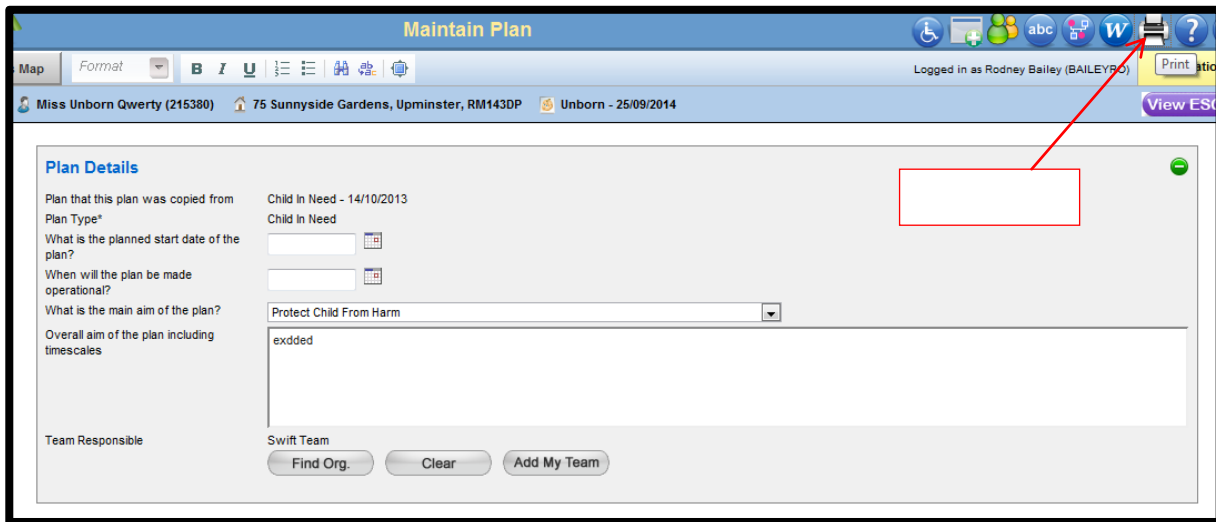
Actions:  
FSW to support Jonny to attend GOSH appointments on February 15<sup>th</sup> and March 7<sup>th</sup>.  
Head of year and Deputy Head Teacher to monitor and update the social worker on any occasion the children present as smelling of urine or dirty.

OK will save any unsaved changes in all the need related sections below. Cancel will discard any unsaved changes in those sections.

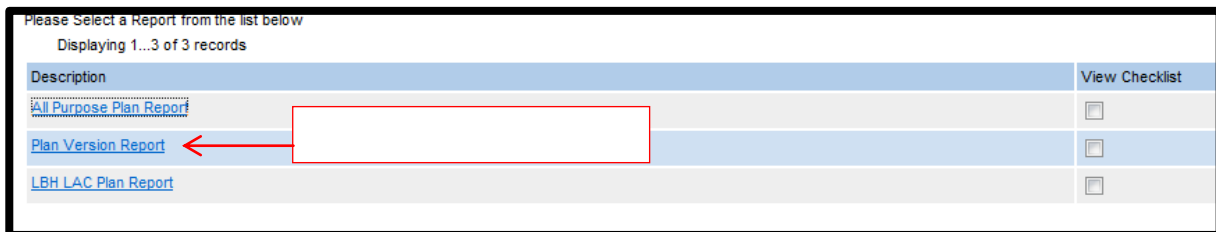
After completing all relevant sections of the Plan, the Plan then needs to be Version Controlled.  
 (Copy Plan to any siblings before version controlling)

CCM has a Functionality to which Plans can be upload onto ESCR directly from CCM allowing the document to be Version Controlled.

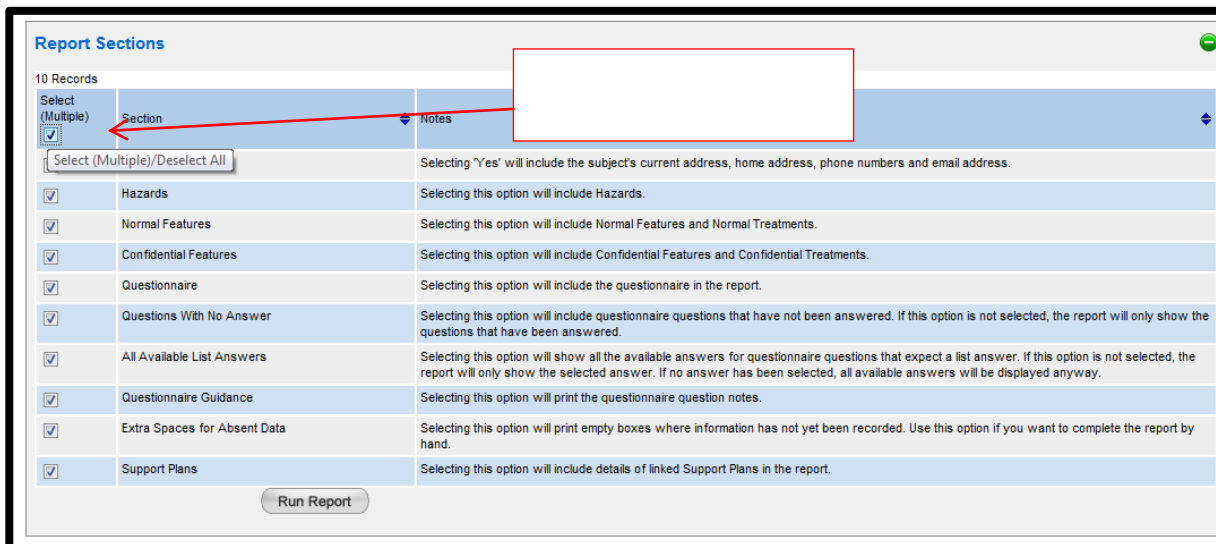
1. Complete the 'Plan' fully i.e Needs & Actions located within the **Navigation tab**.
2. Once all is complete go to the Printer Icon.



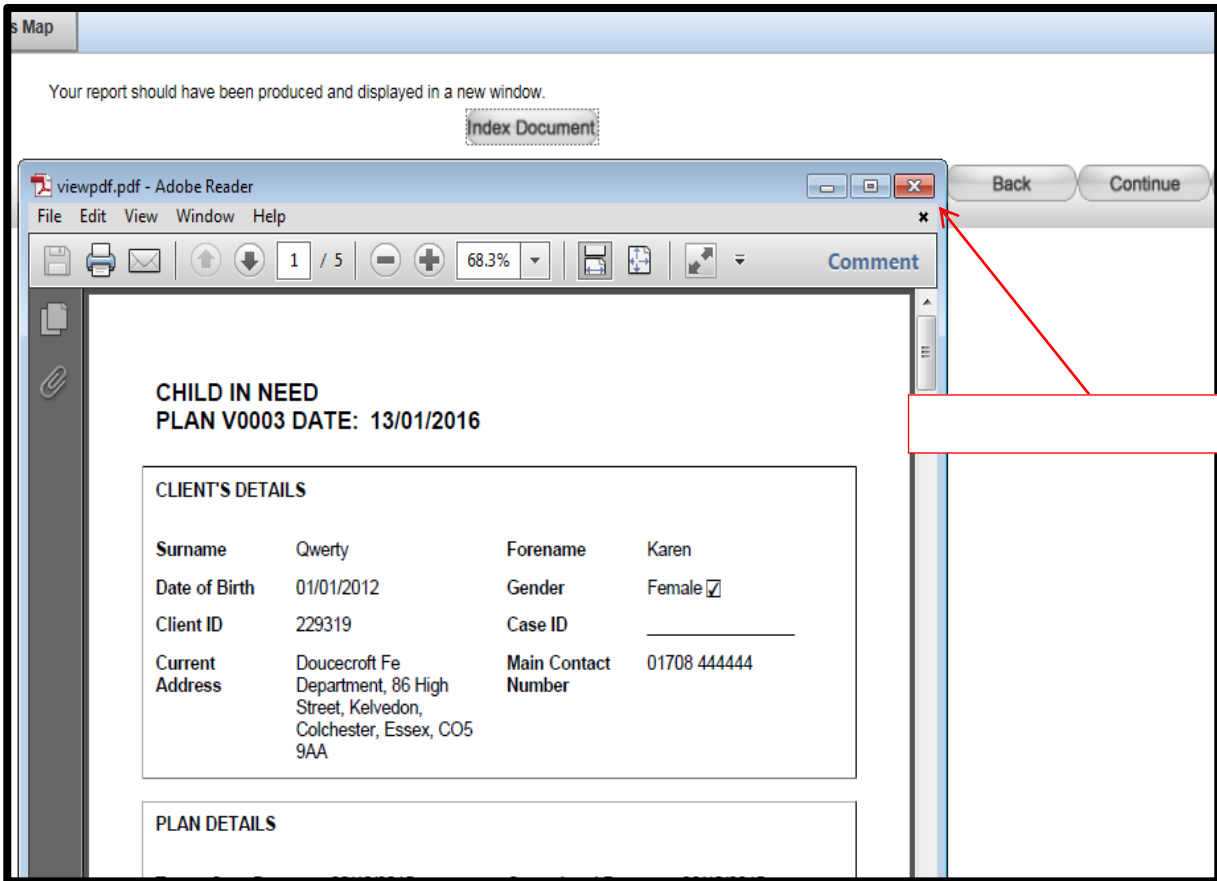
3. Click on the exemplar (**Plan Version Report – No Logo.**)



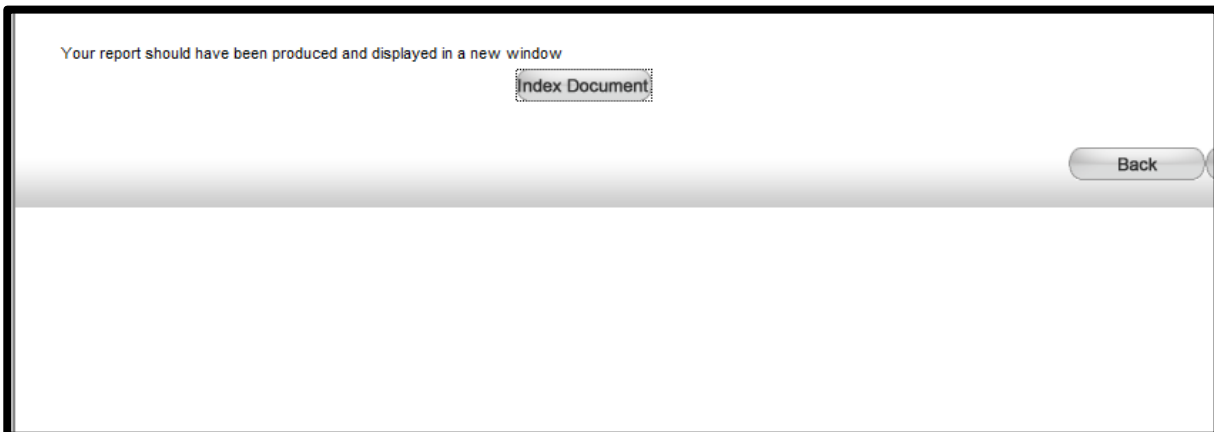
4. Tick the required boxes (if in doubt select all). Then Run Report.



The Plan appears as a PDF allowing you to print if required. In this case do not print the document close it by the **'Red Cross'**.



Your screen should resemble the screenshot below. Click on **'Index document'**.



The screen below appears

**Document Description**

Description of Document\* Plan V0001 - Child in Need Plan (LEAN) - Miss Dorr x

**Indexing Details**

Index Against  Person  Organisation

Identifier\* 231610

Person Name\* Miss Dorrette Qwerty

Include Document Stores for historic Categories

Document Store\*

Significant Event

**Index List**

Index List

0 Records

Identifier	Name	Document Store	Document Type	Significant Event	Delete
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You then need to select the 'Document Store' i.e. **Planning**.

After making your selection a 'Document Type' appears, select 'Plans'.

**Document Description**

Description of Document\* Version 1 - Master Child Qwerty

**Indexing Details**

Index Against  Person  Organisation

Identifier\* 165328

Person Name\* Master Child Qwerty

Include Document Stores for historic Categories

Document Store\* Please select

Significant Event Please select

**Index List**



After completing all the information click on **'Add to List'** then **'Save'**.

**Document Description**

Description of Document\*

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**Indexing Details**

Index Against  Person  Organisation

Identifier\*

Person Name\*

Include Document Stores for historic Categories

Document Store\*

Document Type\*

Significant Event

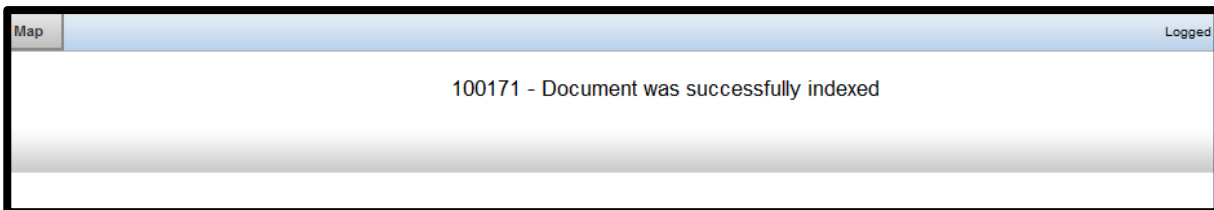
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**Index List**

1 Record

Identifier	Name	Document Store	Document Type	Significant Event	Delete
165328	Master Child Qwerty	C - Planning	Plans		<input type="checkbox"/>

Your document should now be saved to ESCR



Once the document has been uploaded, click on **'Continue'**.  
You are then taken back to the front page of the **'Plan'**.

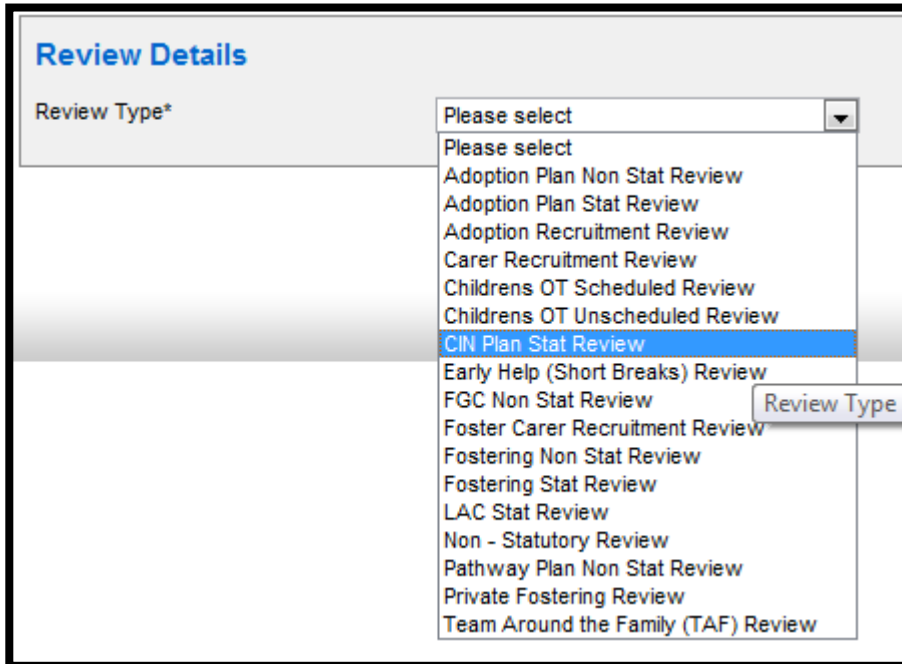
## Recording Reviews:

Make sure you are in the record of the Child you want to record the Review against

- **Reviews** – Side Bar Menu
- **Add Review Button**



- Select **'Review' Type (i.e. CIN Plan Stat Review)**



- In order to complete the **'Review'** follow text box below:

### Review Details

Review Type\* CIN Plan Non Stat Review

Due Date\*  Due Time

Scheduled Date  Scheduled Time

Subject of the review\* Miss Amy Qwerty

Location of the review Yew Tree Resource Centre, 20 Yew Tree Gardens, Romford, RM7

Address type of the location Home

Telephone number for the location

Was the review planned?  Yes  No  Unknown

Review Reason Please select

Status Please select

Person Responsible

Team / Agency Responsible

Plan to be reviewed

Completed Date

Delay Reason Please select

Completion Notes

**Complete the following fields:**

**Due Date / Time.**

**Sch Date / Time.**

**Location of the 'Review'.**

**Address Type / Contact No.**

**Was the 'Review' Planned** – Yes or No

**Review Reason** – select from drop down

**Status** – select from drop down

**Person Responsible** – Find Person

**Team Responsible** – Find Team

**Plan to be reviewed** – Find Plan

- Involvements:** This is where Involvements can be added. If any professional has had an involvement already then click **'Link Inv'**.
- If a new Involvement then click **'Add Inv'**.

### Involvements

0 Records

Name	Roles or Relationship	Reason Involved	Invited	Date Invited	Accepted	Attendance	Consulted	Submitted Report	Plan Involvement	More	Unlink
There are 20 records available to link to the Review.											

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### Case Notes and Visits

0 Records

Type	Due Date	Note/Visit Date	Headline	Outcome	Unlink
There are records available to link to the Review.					

- Case Notes & Visits:** Workers can add a **'Case Note'** or **'Visits'** to the **'Review'**. If a **'Case Note/Visit'** has already been recorded then click **'Link Note/Visit'**.
- If a new Case Note needs recording then click **'Add Note'**. If a new Case Note needs recording then click **'Add Note'**.

**Navigation**

The **'Navigation'** section can be found at the top right once on the **'Review'** page.

Review Details
Copy Review
Involvements
Case Notes and Visits
Decisions
Outcomes
<input type="checkbox"/> Options Summary
<input type="checkbox"/> Needs
<input type="checkbox"/> Personal Outcomes

The **'Navigation'** section needs to be completed. Only complete the relevant section according to the review.

- Review Details
- Involvements
- Case Notes/Visit (optional)
- Decisions
- Needs
- Personal Outcomes

Once the **'Review'** date has been entered & **'Saved'**, thereafter the **'minutes'** section appears under the **'Navigation'** section.

Review Details
Copy Review
Involvements
Case Notes and Visits
Decisions
Outcomes
<input type="checkbox"/> Options Summary
<input type="checkbox"/> Needs
<input type="checkbox"/> Personal Outcomes
<input type="checkbox"/> Minutes (0/1)

**Minutes tab**

**Minutes Tab:**

This is where minutes of the **'Review'** are recorded.

Minutes can also be uploaded onto **ESCR**.

(Minutes dimension only appears once review date has been entered & saved).

Updating Needs, Actions & Outcomes and Ending Needs

**Ensure that the Plan has been version Controlled  
Please See Version Control user guide**

Click on Needs, Actions/Outcome to update details or End Needs

**Update Needs, Actions & Outcomes**

Over write the text information within the Outcome box

**End Needs**

Enter the date any **Need** has ended within the not required date box which will automatically end the Outcome

**Removing Needs from Plan/Review:**

Once the Need has ended & no longer exists, it needs to be removed from the Plan/Review by un-ticking the Need.

This can be found under the Needs tab within the navigation menu bar.

## Update Actions and Outcomes:

Needs and Options Summary

Child's Developmental Needs

Need

[Emotional & Behavioural Development Need -](#)

[Read More](#)

Before changing any 'Actions and Outcomes' on the Plan.  
Please ensure that a previous version of the 'Plan' is on ESCR

Needs Linked to the Plan

0 Records

View Details	Need Group	Need	Description	Identified Date	Count of Other Plans	Count of Assess	Not Required Date	Not Required Reason	Action Required	Unlink	Delete
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There are 9 records available to link to the plan

[Link Needs](#) [Add Need](#)

Need\*

Description\*

Identified Date\*

Required By Date

Not Required Date

Action & Outcomes Required **38638**

OK will save any unsaved changes in all the need related sections below. Cancel will discard any unsaved changes in those sections.

Need\* Child's Developmental Needs

Description\* Health: Jonny was diagnosed with epilepsy by a paediatric consultant at Queens Hospital in September 2015. Since then he has had 3 seizures which has ended in him being admitted to hospital. The diagnosing consultant at Queens referred Jonny to GOSH for treatment and monitoring. Health professional feel that Jonny's epilepsy can be managed through treatment at GOSH but Jonny has missed all three of his appointments from October to present.

Identified Date\* 05/01/2015

Required By Date 10/02/2015

Not Required Date 10/02/2015

Not Required Reason Please select

If this need has an outcome and options, these will also be ended. If services and provisions also exist for this need, do you wish to end these too?  
 End services and provisions  Do not end services and provisions

Action & Outcomes Required FSW to support Jonny to attend GOSH appointments on February 15<sup>th</sup> and March 7<sup>th</sup>.  
Head of year and Deputy Head Teacher to monitor and update the social worker on any occasion the children present as smelling of urine or dirty.

OK Cancel

OK will save any unsaved changes in all the need related sections below. Cancel will discard any unsaved changes in those sections.

1 Record

View Details	Need Group	Need	Description	Identified Date	Count of Other Plans	Count of Assess	Not Required Date	Not Required Reason	Action Required	Unlink	Delete
<input checked="" type="checkbox"/>		Child's Developmental Needs	Health: Jonny was diagnosed with epilepsy by a paediatric consultant at Queens Hospital in September 2015. Since then he has had 3 seizures which has ended in him being admitted to hospital. The diagnosing consultant at Queens referred Jonny to GOSH for treatment and monitoring. Health professional feel that Jonny's epilepsy can be managed through treatment at GOSH but Jonny has missed all three of his appointments from October to present. <a href="#">Read More</a>	05/01/2015	2	1	10/02/2015		FSW to support Jonny to attend GOSH appointments on February 15 <sup>th</sup> and March 7 <sup>th</sup> . Head of year and Deputy Head Teacher to monitor and update the social worker on any occasion the children present as smelling of urine or dirty. <a href="#">Read More</a>	<input checked="" type="checkbox"/>	

There is 1 record available to link to the plan

Link Needs Add Need

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Need\* Child's Developmental Needs

Description\* Health: Jonny was diagnosed with epilepsy by a paediatric consultant at Queens Hospital in September 2015. Since then he has had 3 seizures which has ended in him being admitted to hospital. The diagnosing consultant at Queens referred Jonny to GOSH for treatment and monitoring. Health professional feel that Jonny's epilepsy can be managed through treatment at GOSH but Jonny has missed all three of his appointments from October to present.

Identified Date\* 05/01/2015

Required By Date 10/02/2015

Not Required Date 10/02/2015

Not Required Reason Please select

If this need has an outcome and options, these will also be ended. If services and provisions also exist for this need, do you wish to end these too?  
 End services and provisions  Do not end services and provisions

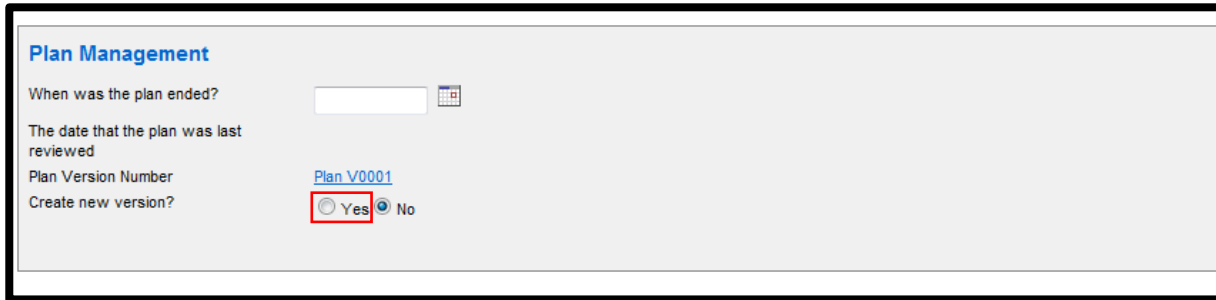
Action & Outcomes Required FSW to support Jonny to attend GOSH appointments on February 15<sup>th</sup> and March 7<sup>th</sup>.  
Head of year and Deputy Head Teacher to monitor and update the social worker on any occasion the children present as smelling of urine or dirty.

OK Cancel

OK will save any unsaved changes in all the need related sections below. Cancel will discard any unsaved changes in those sections.

After making changes Index your Plan to ESCR then scroll to the bottom of the screen to **'Plan Management'**.

Select yes to **'Create new version'** then click on **'Save'**.



The screenshot shows the 'Plan Management' interface. It includes a date picker for 'When was the plan ended?', a label 'The date that the plan was last reviewed', a 'Plan Version Number' field with the value 'Plan V0001', and a 'Create new version?' section with radio buttons for 'Yes' (selected) and 'No'.

After clicking on **'Save'** you are taken back to the Plan Type screen.

Click on your **'Plans'** then scroll to **'Plan Management'** where your Plan now says **'Version 2'**.



The screenshot shows the 'Plan Management' interface after a save. The 'Plan Version Number' field now displays 'Plan V0002'. The 'Create new version?' section has the 'No' radio button selected.

After completing the above requirements click on **'OK'**.

Click on **'Plan Management'** within the navigation tab to return to the front screen of the **'Plan'**

### Step By Step.

1. Create **'Contact'** along with **'Referral'** if there are concerns.
2. Complete V3 Assessment adding/linking any **'Needs'**.
3. If after the **'Assessment'** there are still concerns.
4. Create your **Plan**.
5. Ensure that all relevant needs are linked to the **Plan**
6. Once **Plan** has been created **Version Control** onto **ESCR**
7. Open **Review** & complete **Review** document then link the **Plan** to the **Review**
8. Print **Review** document to take to Review
9. **Review** takes place
10. After **Review** open **CCM** & go to the **Review** tab
11. Navigate to **Needs** within the navigation tab
12. Update/End - the **Actions & Outcomes'**.
13. **Version Control** the **Plan**
14. Change **Plan Version**.

Repeat from step 4 to schedule a new **'Review'** or if all **'Needs'** have been met then end needs along with the **'Plan'**.