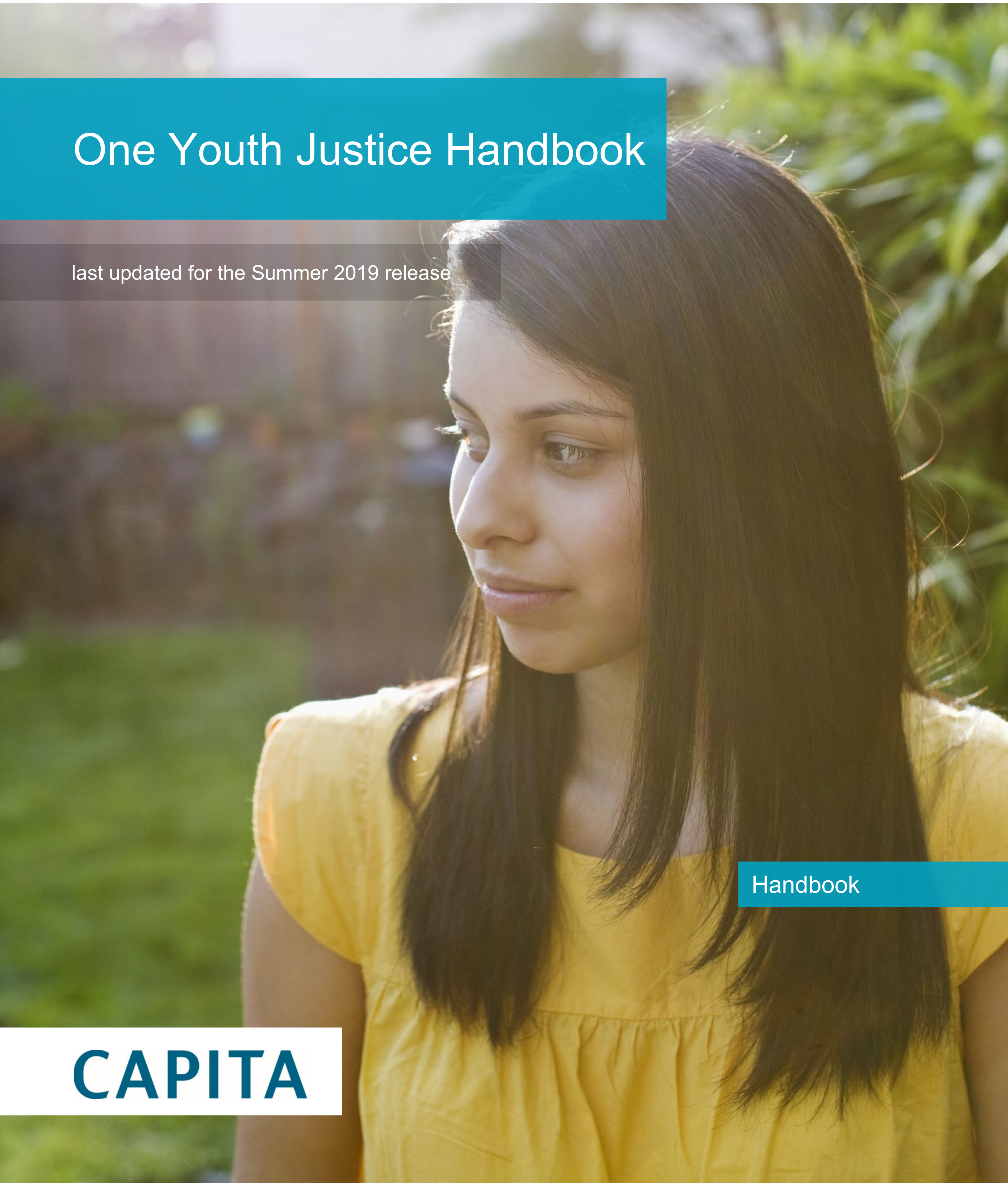

One Youth Justice Handbook

last updated for the Summer 2019 release

Handbook

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You can log a call with One Application Support via the Customer Service tool available on My Account.

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Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

Contents

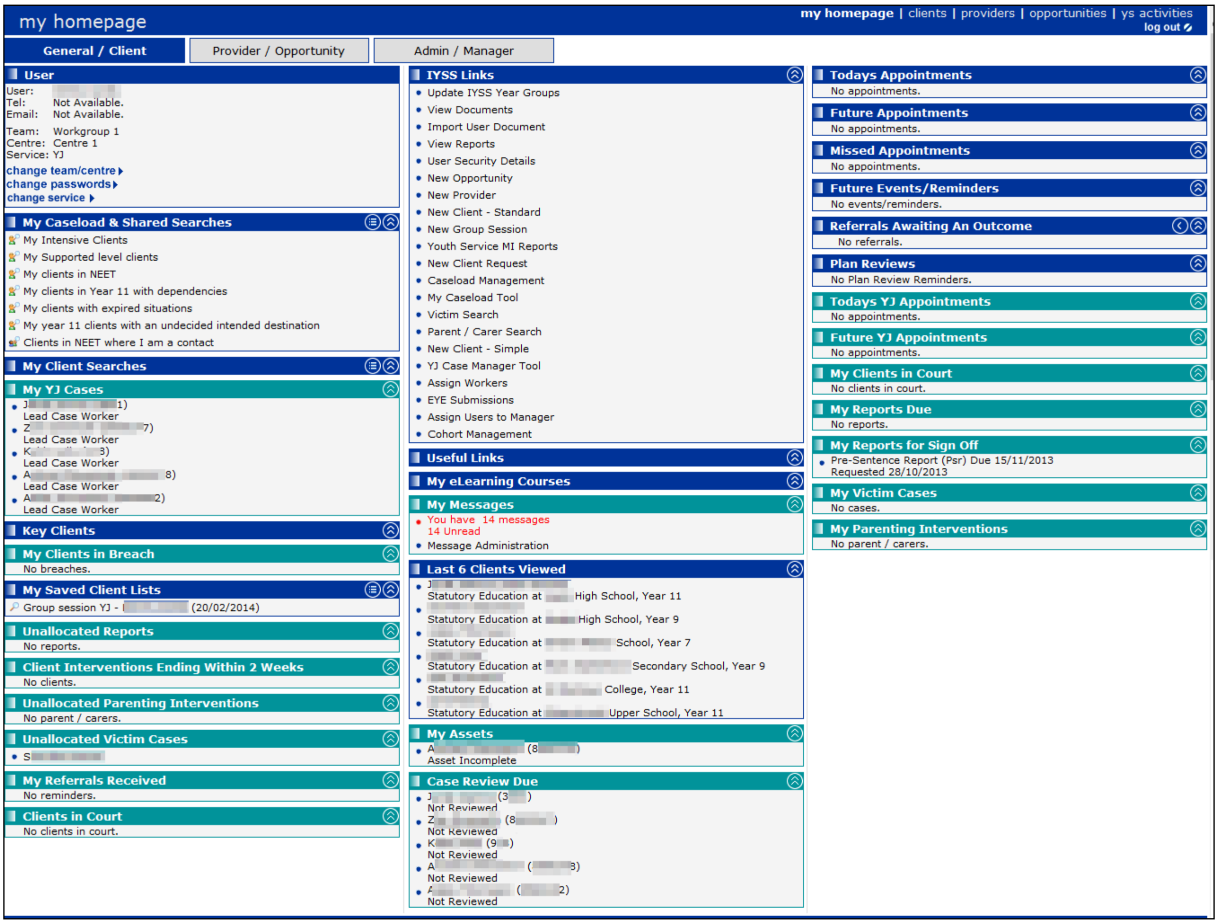
01 | Document Change Control

Date	Release	Description
Summer 2019	3.69	**YJB Statutory changes for 2019/20 applied in this release for the following:** • Knife Offence New rule to automatically triggering 'knife related' for 11 YJB specified offence, introduced in this release For more details see:Knife Related Offence Page *35* • YJB Schema The Youth Analytical Data Schema file has changed with the removal of several fields. All references to version 3.0.1 have changed to v4.0.0. *(Info only no action required)* • Gang Association Gang Associations' response in AssetPlus (Personal Family & Social Factors / Parenting Family & Relationships and Core record / Alerts & Flags) will be collected by the YJB and is now included in the Schema. (*Info only no action required*).
		Police National Legal Database The PNLD (Police National Legal Database) offences list has been updated to the latest version 4.5, published by the YJB in April 2019. (*Info only no action required*).
		YJB Submissions to Placements YJB Submissions to Placements have been updated to process a 3rd message response from the YJB hub and update a version number being transmitted to the YJB hub. (*Info only no action required*).

Date	Release	Description
Autumn 2018	3.67	**Case Transfers** Changes have been made to facilitate Case Transfers in preparation for a future release: • In the Actions menu on the Client View, the YJB Submissions option has been renamed Placement History. This distinguishes between Placements and Case Transfer history. There is also a new option in the Actions Menu named Case Transfer History. This takes you to an Under Construction page until case transfers is live. • When creating a stage, there is a new field named Case Type. This is a mandatory, dropdown field. • The AssetPlus Stage Summary screen now displays the Case Type field. Please be aware that some screenshots in this document may not have been updated to reflect all of these changes.

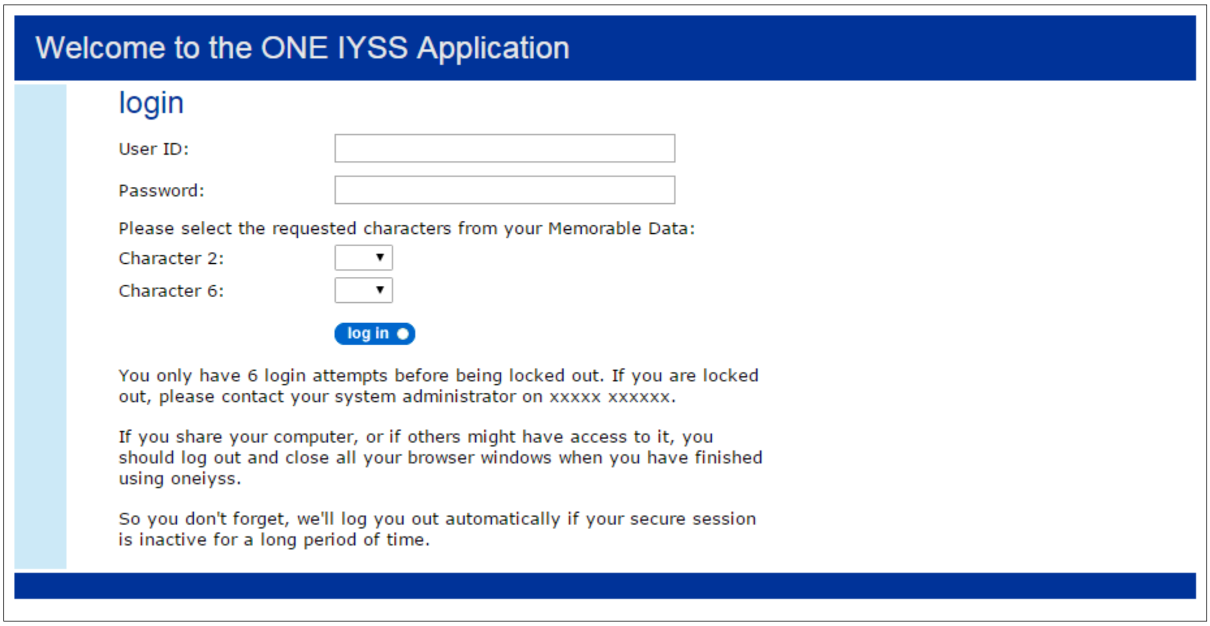
02 | Homepage

The main screen in Youth Justice is **my homepage**. From **my homepage** you can access your clients, appointments and messages through their respective panels. Your System Administrator configures your **my homepage** to display the panels relevant to you.



Logging in

1. In your web browser, go to the IYSS homepage. If you do not know the address, contact your Youth Justice coordinator.

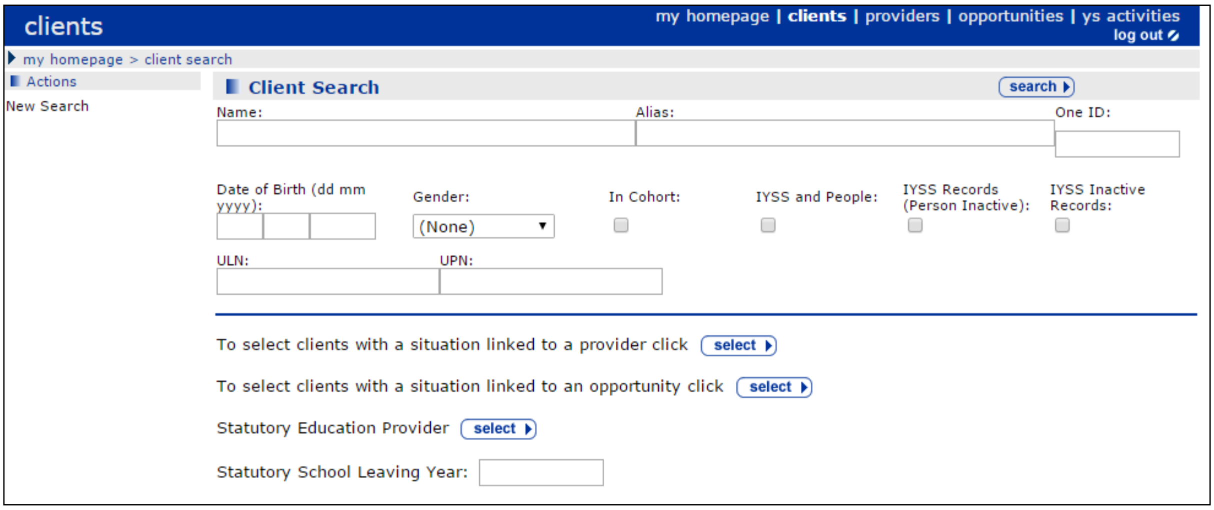


2. Enter your **User ID**.
3. Enter your **Password**.
4. Click the **log in** button.

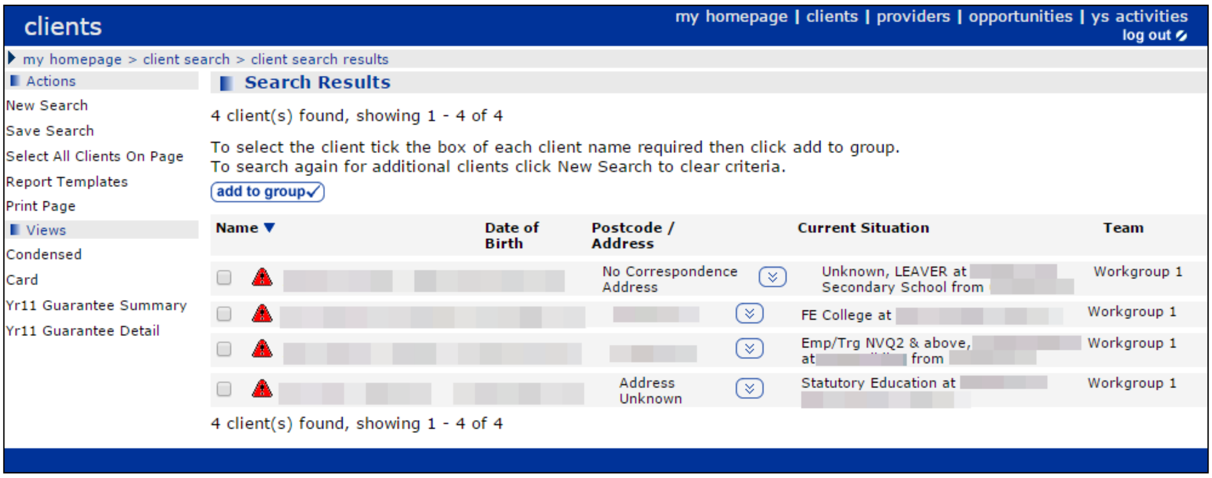
03 | Creating a New Client Record

To create a new Youth Justice record for a young person:

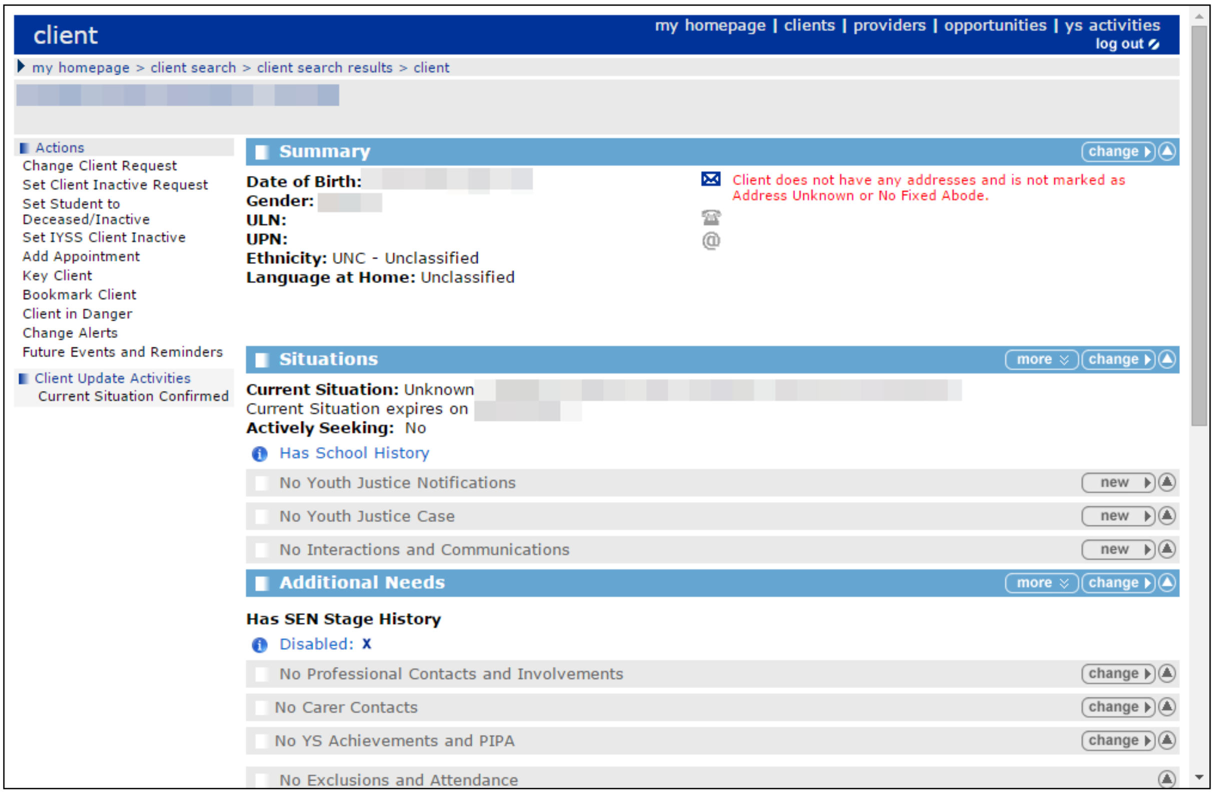
1. Log in to **my homepage**.
2. In the blue header, click the **clients** hyperlink to display the **Client Search** screen.



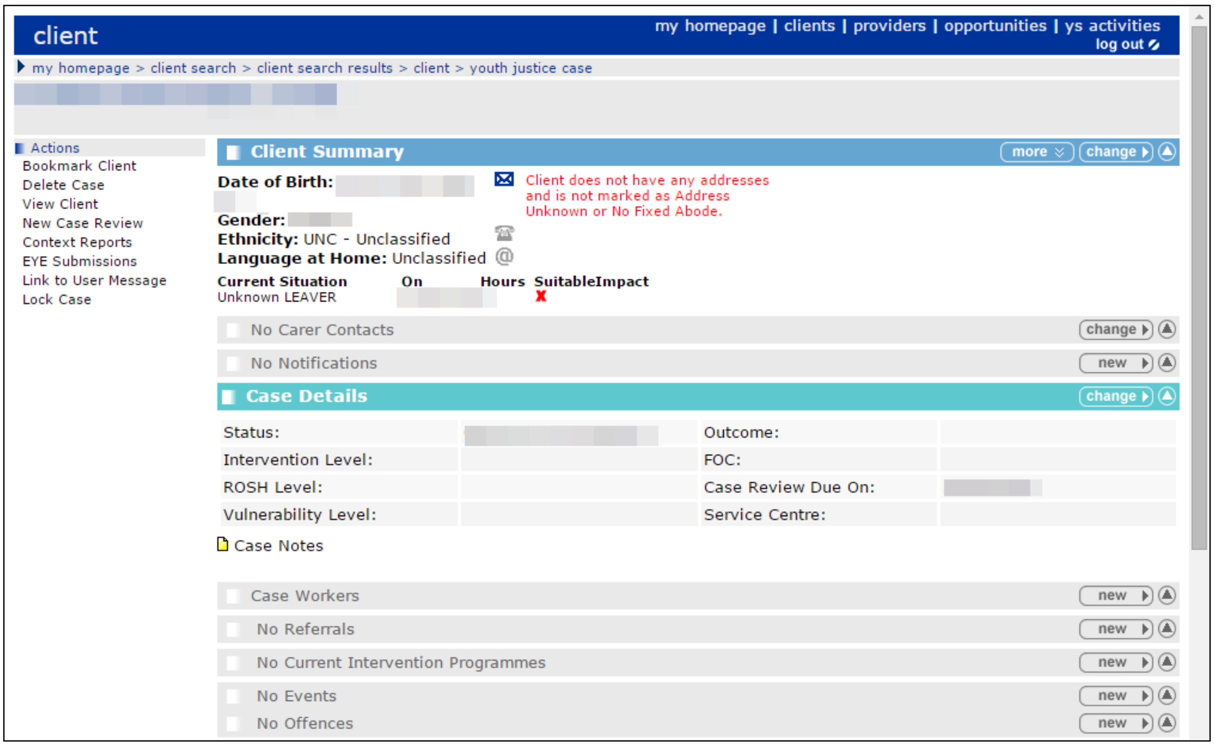
3. Enter as much detail as possible into the relevant fields.
4. Click the **search** button to display a list of matching results.



5. Click the appropriate name to display the **Client Summary** screen.



6. In the **No Youth Justice Case** panel, click the **new** button to create a blank client record.



7. To add information to the record, see the relevant sections of this guide.

04 | Accessing Client Records

Panels containing your Youth Justice cases and more recently viewed clients, as well as clients in certain situations are displayed on **my homepage**. You may wish to bookmark important clients to facilitate access to their record without needing to return to **my homepage.**

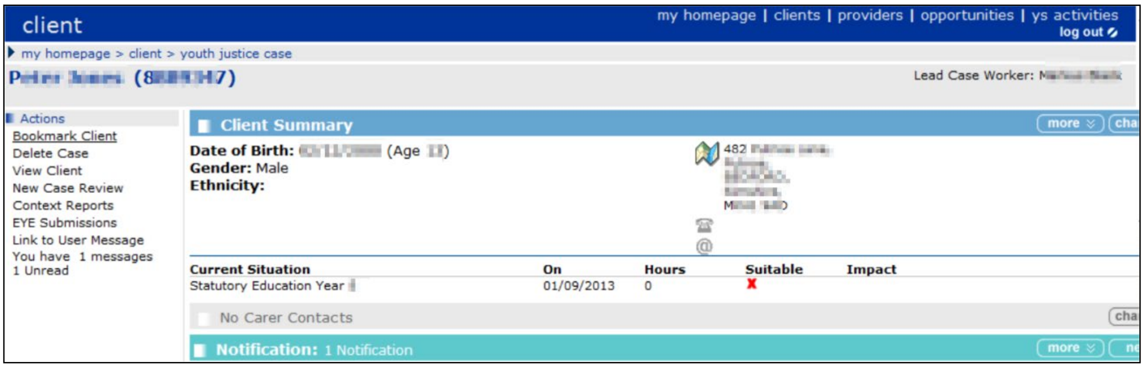
Accessing Client Records from My Homepage

1. Log in to **my homepage**.
2. In the **My YJ Cases** panel, click the name of the client to access their record.

Creating a Client Bookmark

To create a client bookmark:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.

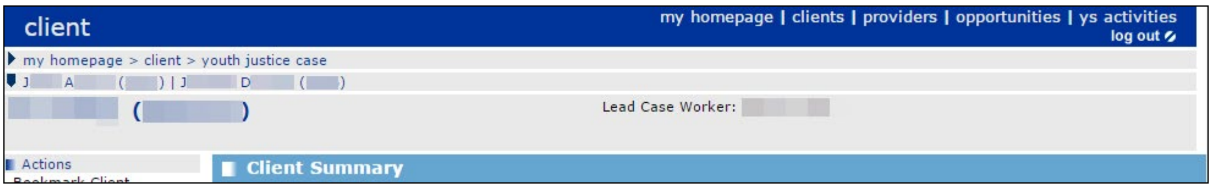


2. In the **Actions** menu on the left-hand side, click the **Bookmark Client** hyperlink.

Accessing a Bookmarked Client Record

You can access client records through bookmarks from most screens other than the **General / Client, Provider / Opportunity** or **Admin / Manager** tabs on the my homepage main screen. You can find bookmarked clients in the grey bar denoted by the bookmark bar icon. To access a bookmarked client record, click the required client name to display their record.

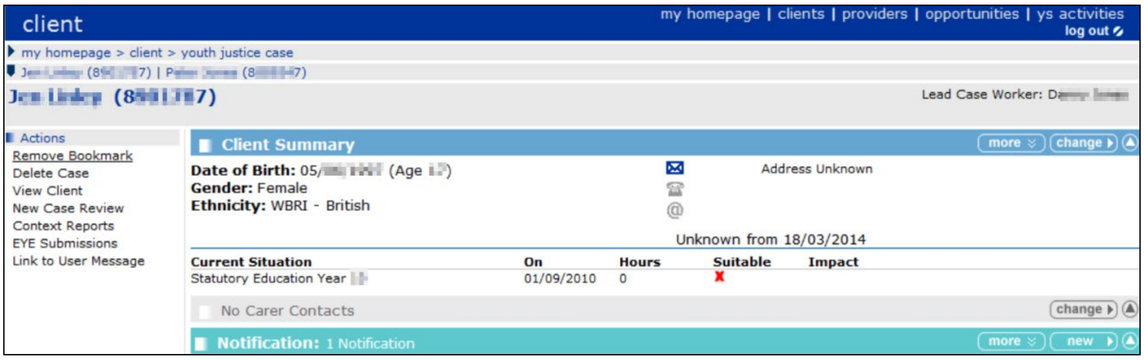
 *Bookmark bar icon*



Removing a Client Bookmark

To remove a client bookmark:

1. In the bookmarks bar at the top of the screen, click the name of the required client to access their client record.



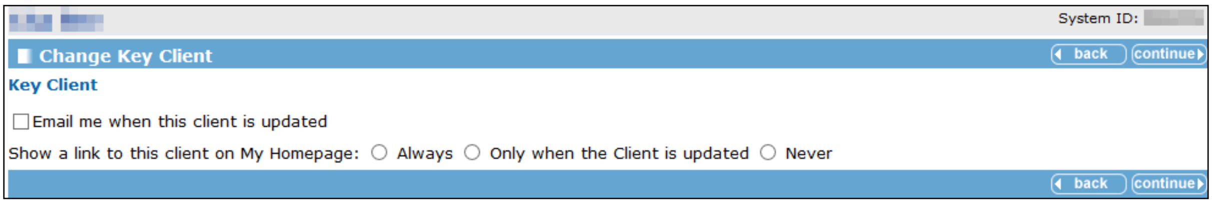
2. In the **Actions** menu on the left-hand side, click the **Remove Bookmark** hyperlink.

Managing Key Clients

To receive email updates about changes to clients, you must set them as Key Clients. This also enables you to determine if and when a hyperlink to their client record is displayed on in the **Key Clients** panel in **my homepage**. The Key Client function is an IYSS function, and so is managed through clients' IYSS records, not the Youth Justice module.

To create or edit Key client settings:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Actions** menu on the left-hand side, click the **View Client** hyperlink to display the clients' IYSS record
3. In the **Actions** menu on the left-hand side, click the **Key Client** hyperlink to display the **Change Key Client** screen.



4. If you want email notifications for this client, select the **Email me when this client is updated** check box.
5. Select the appropriate radio button in the **Show a link to this client on My Homepage** field.
6. Click the **continue** button to save changes and return to the client record.

05 | Situations

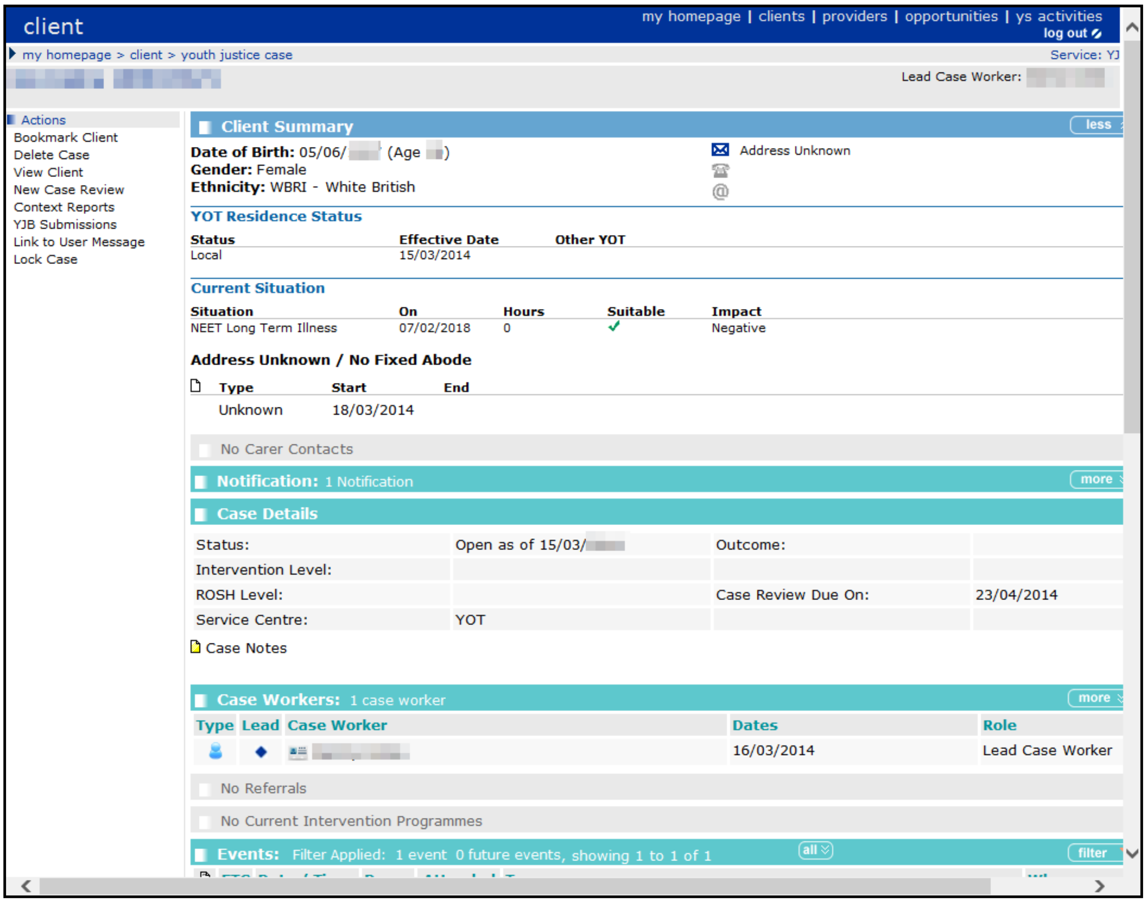
Overview of Situations

The client's case record displays the client's current situation as part of the **Client Summary** panel. Situation information includes the client's current education, employment or training status. You cannot update or add situation information from within the client's YJ case record. However, you can use the **Situations** section of the client record (accessed via the **View Client** link from the **Actions** menu) to add or amend situation information.

Adding an Unlinked Situation

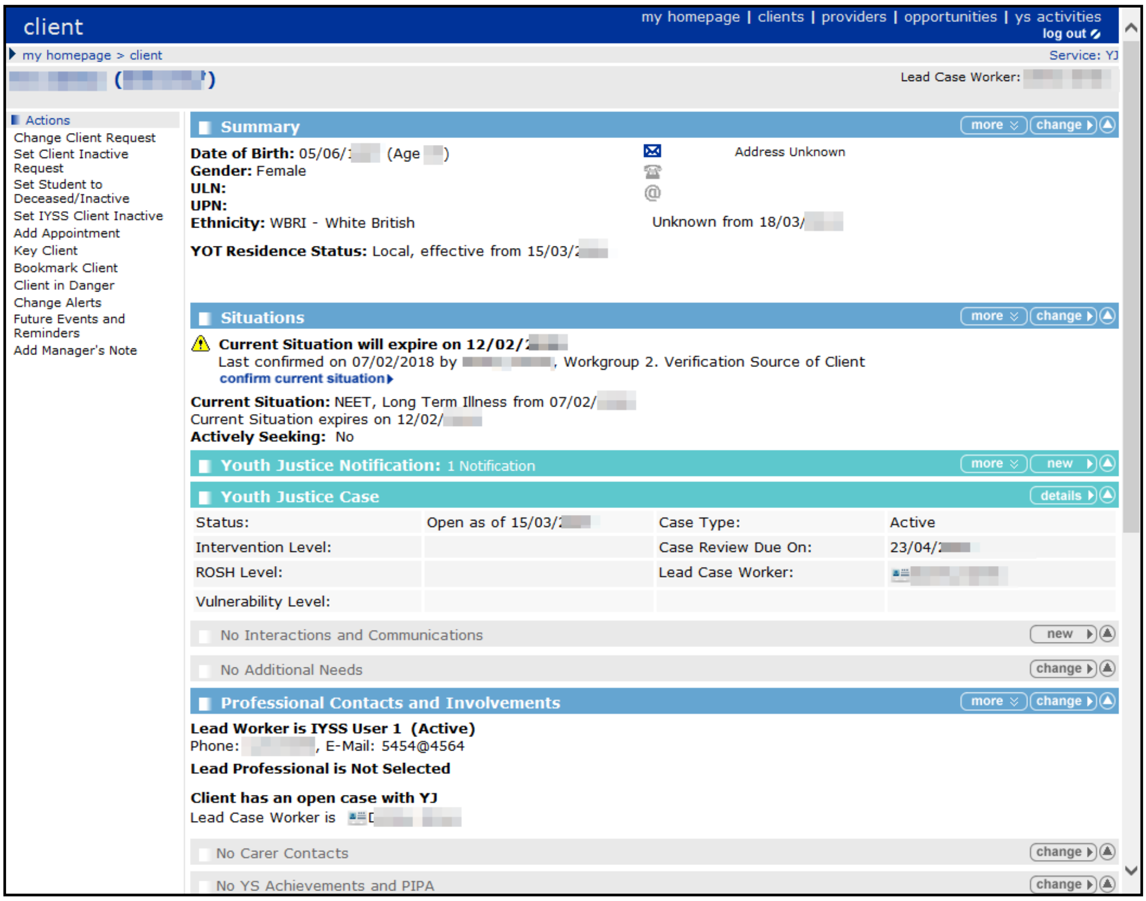
The following procedure shows how to add an unlinked situation to a client record. This example adds a new NEET situation, but the process is similar for all types of situations.

1. Access the required client case. For more information, see Accessing Client Records on page *13*.

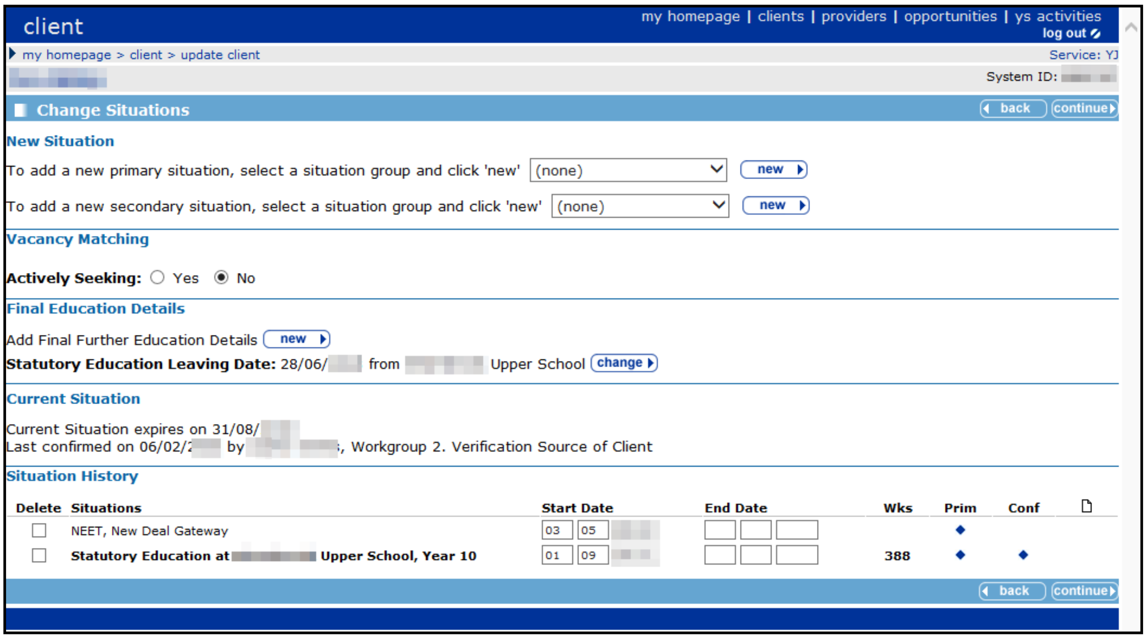


2. Click the **View Client** hyperlink in the **Actions** menu to display the client record.

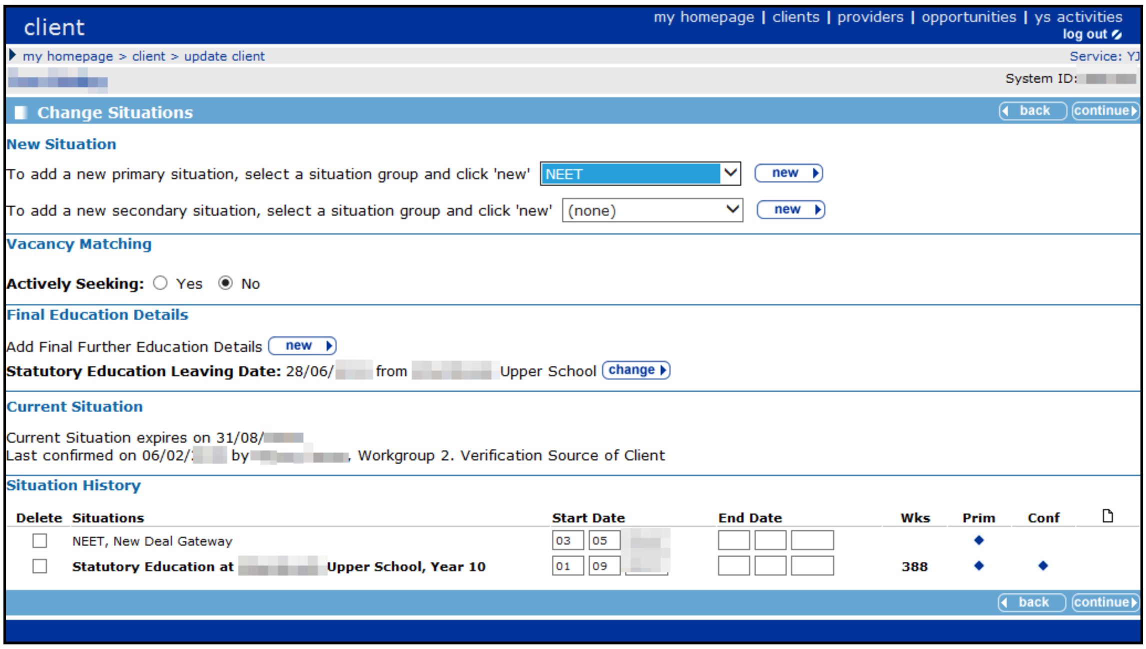
Situations



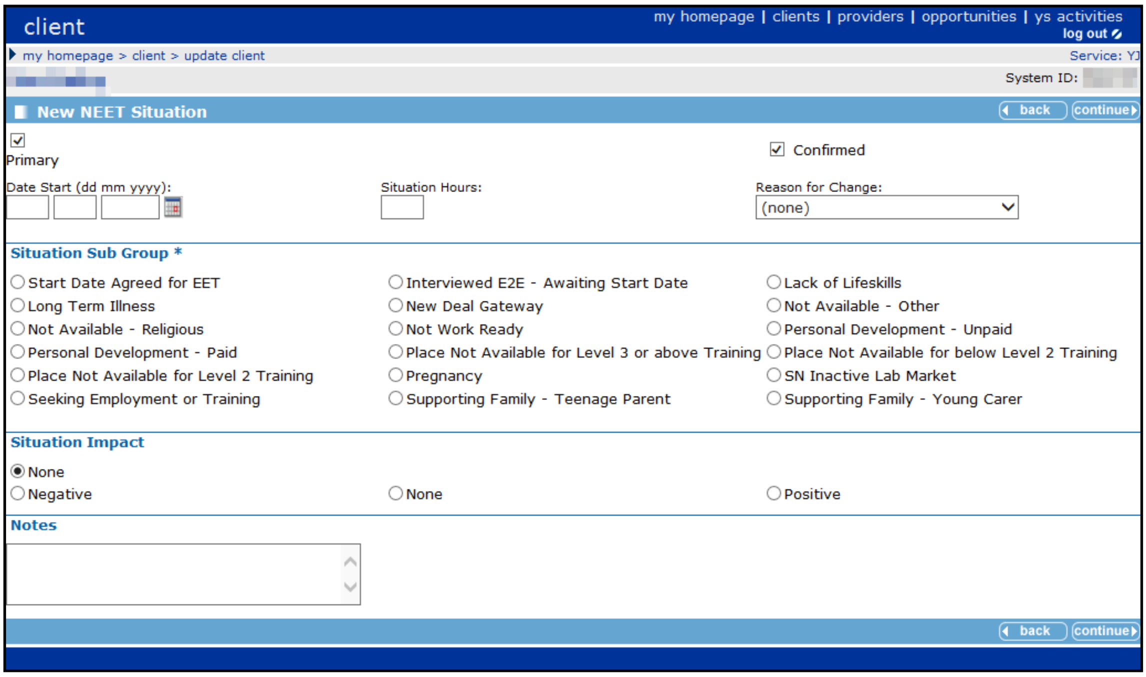
3. In the **Situations** panel, click the **change** button to display the **Change Situations** page.



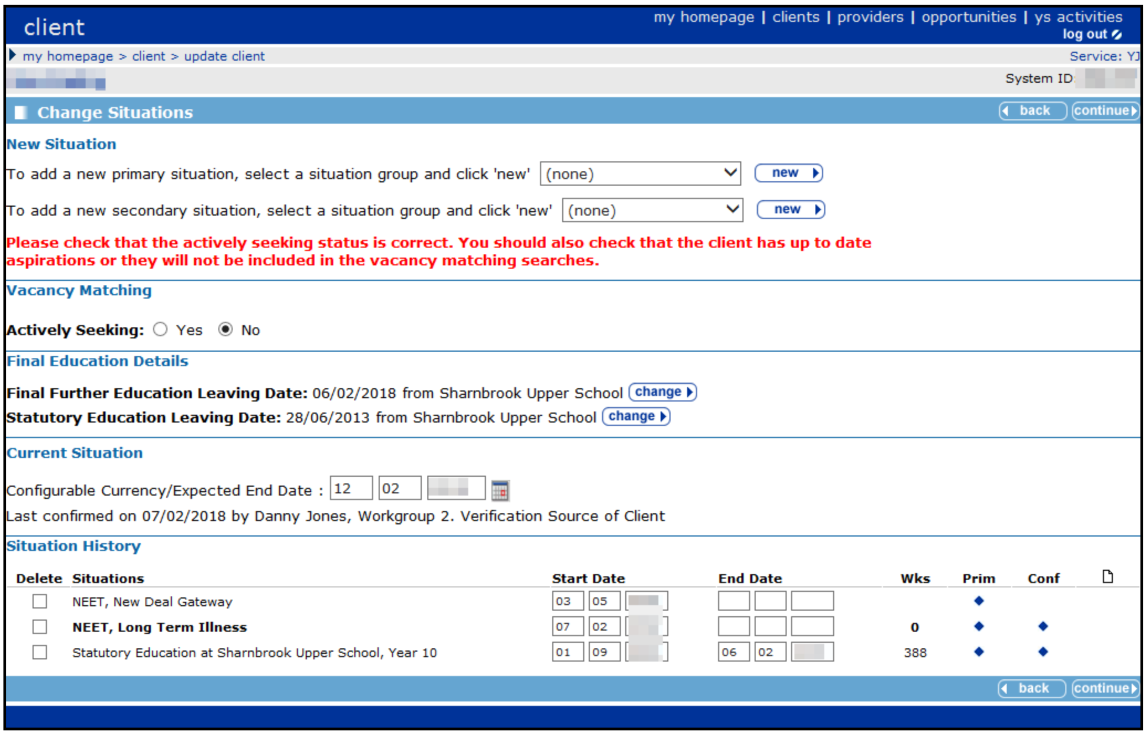
4. In the **New Situation** panel, select **NEET** from the **situation group** drop-down list.



5. Click the **new** button to display the **New NEET Situation** page.



6. Enter the details of the situation. Required items are marked with an asterisk (*).
7. Click the **continue** button to return to the **Change Situations** page.



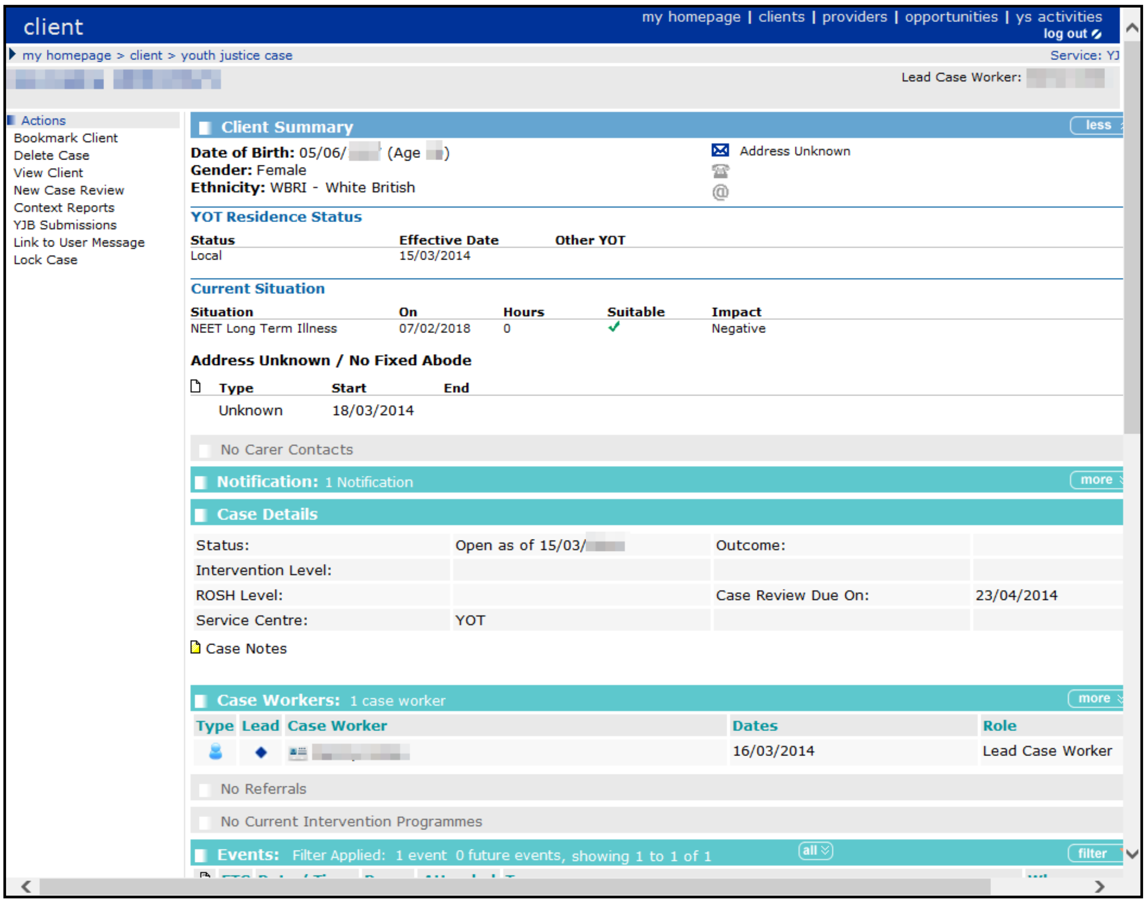
The new situation is listed in the **Situation History** panel. Depending on the situation type, there might be reminders to complete additional tasks.

8. Click the **continue** button to return to the client record.

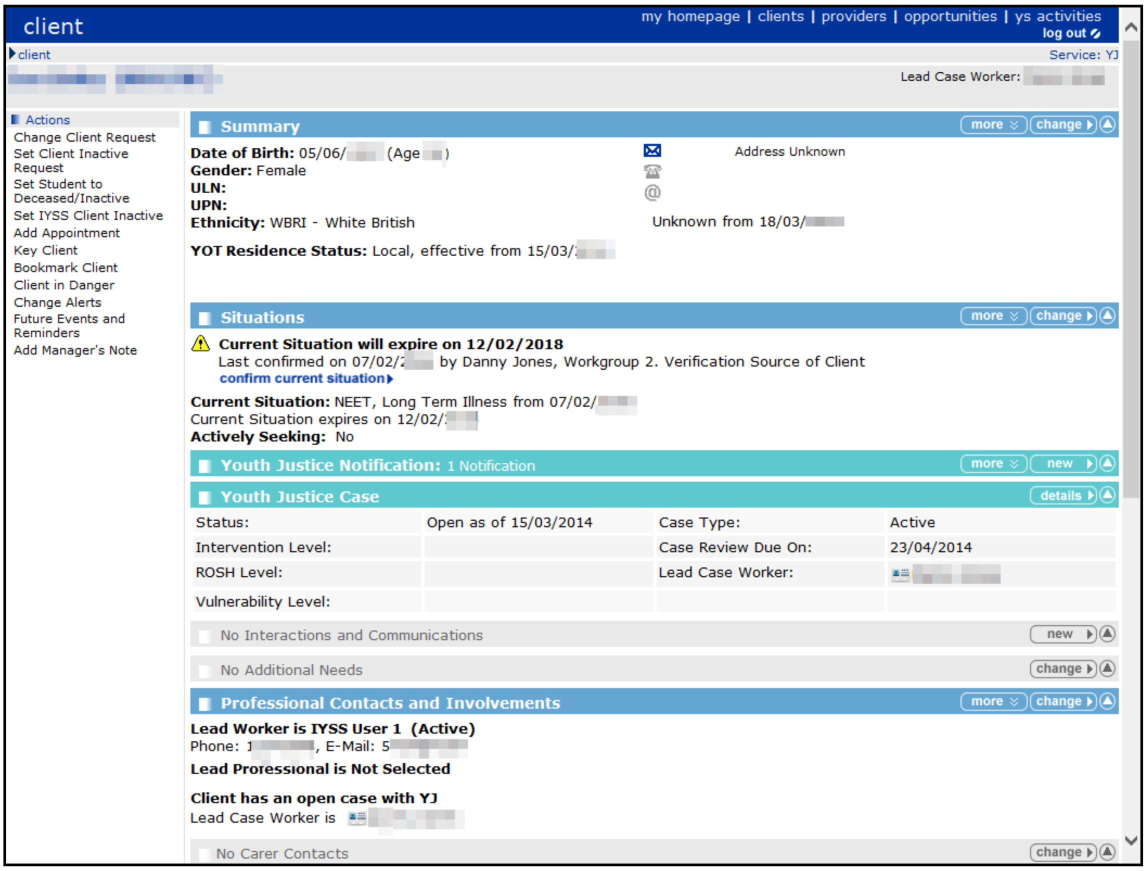
Adding a Linked Situation

This following procedure shows how to add a situation to a client's record that is linked to a provider and opportunity, for example, a school.

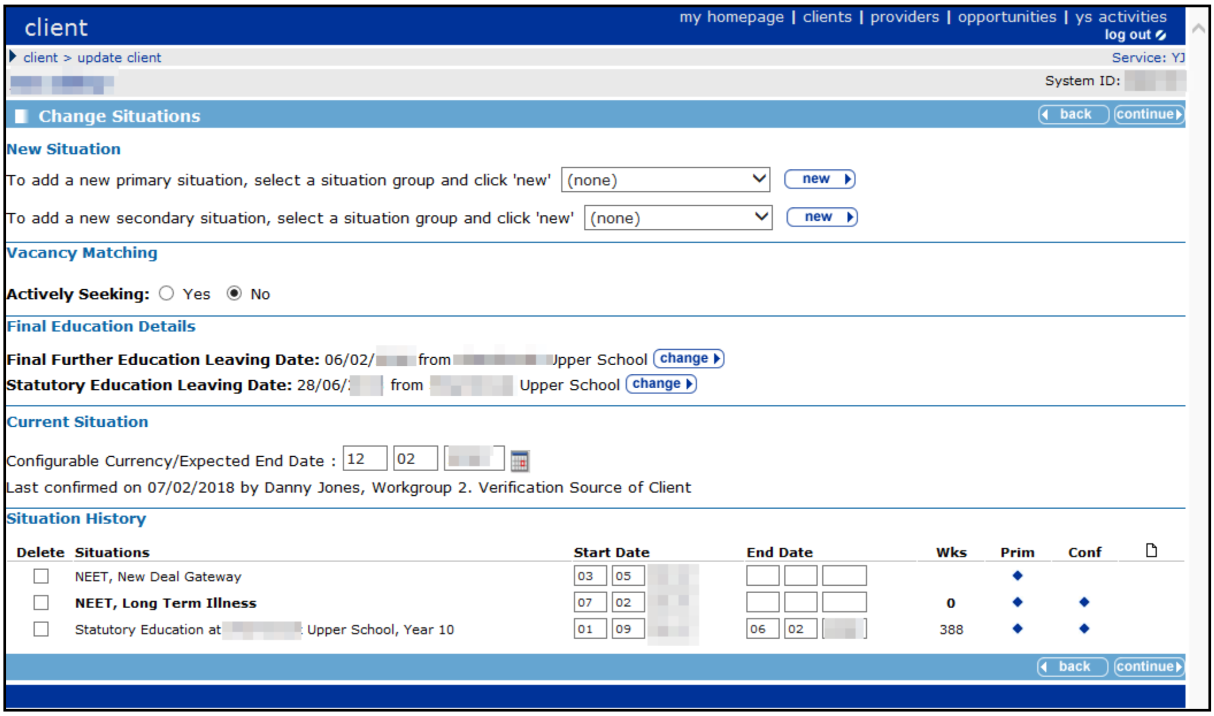
1. Access the required client case. For more information, see Accessing Client Records on page *13*.



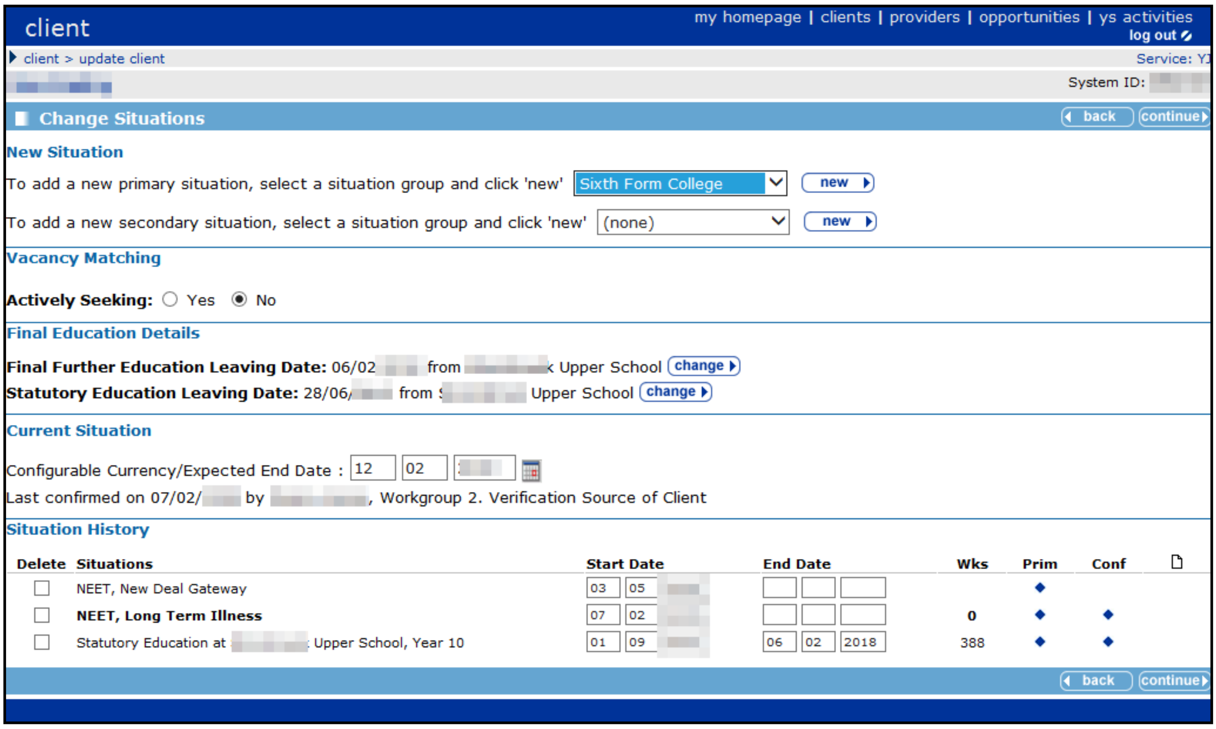
2. Click the **View Client** hyperlink in the **Actions** menu to display the client record.



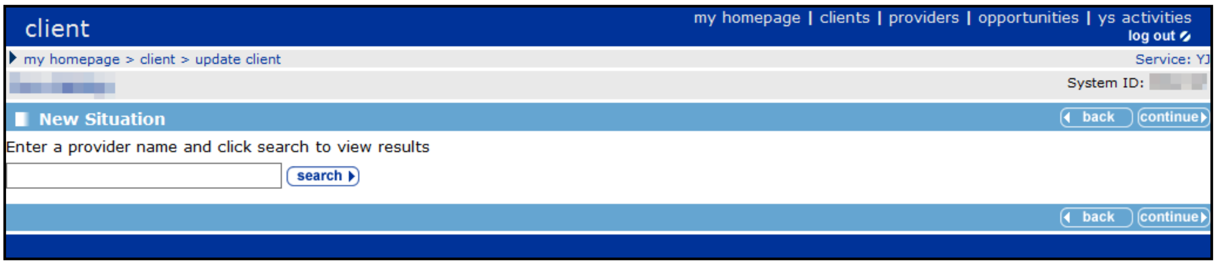
3. In the **Situations** panel, click the **change** button to display the **Change Situations** page.



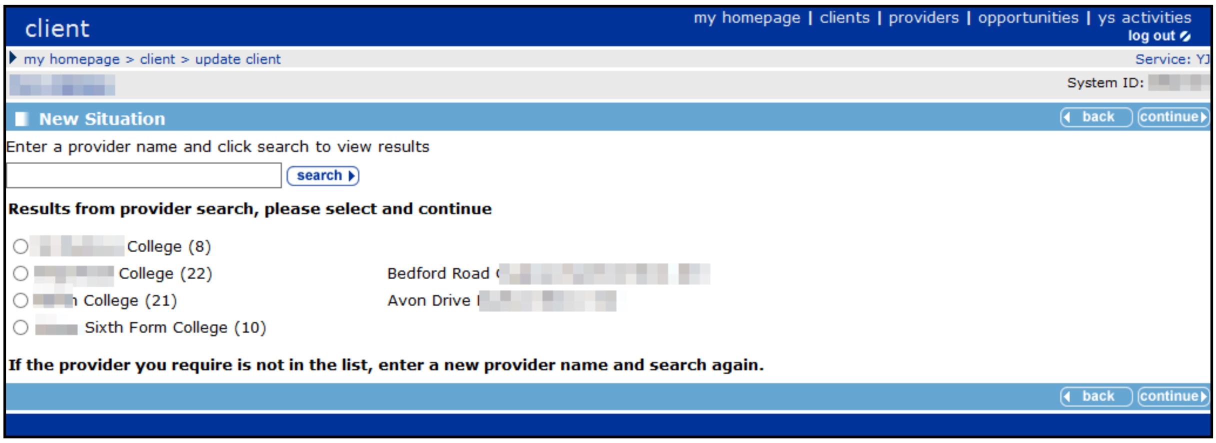
4. In the **New Situation** panel, select **Sixth Form College** from the **situation group** drop-down list.



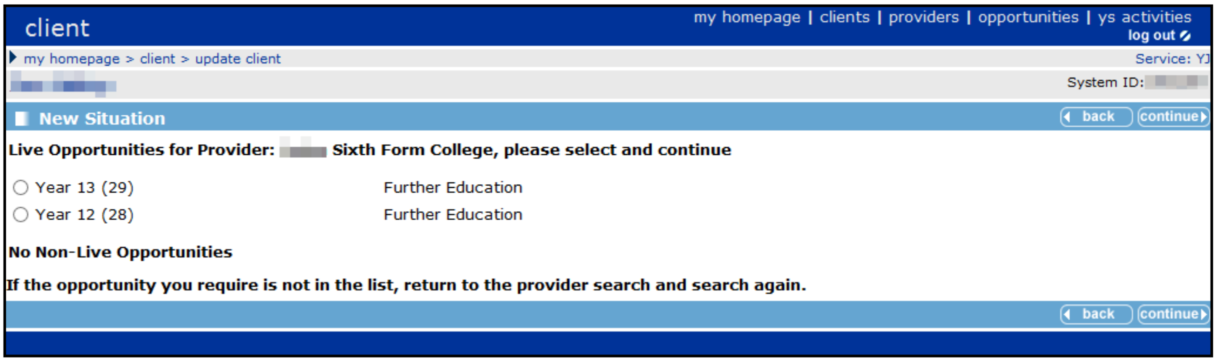
5. Click the **new** button adjacent to the primary situation drop-down to display the **New Situation** page.



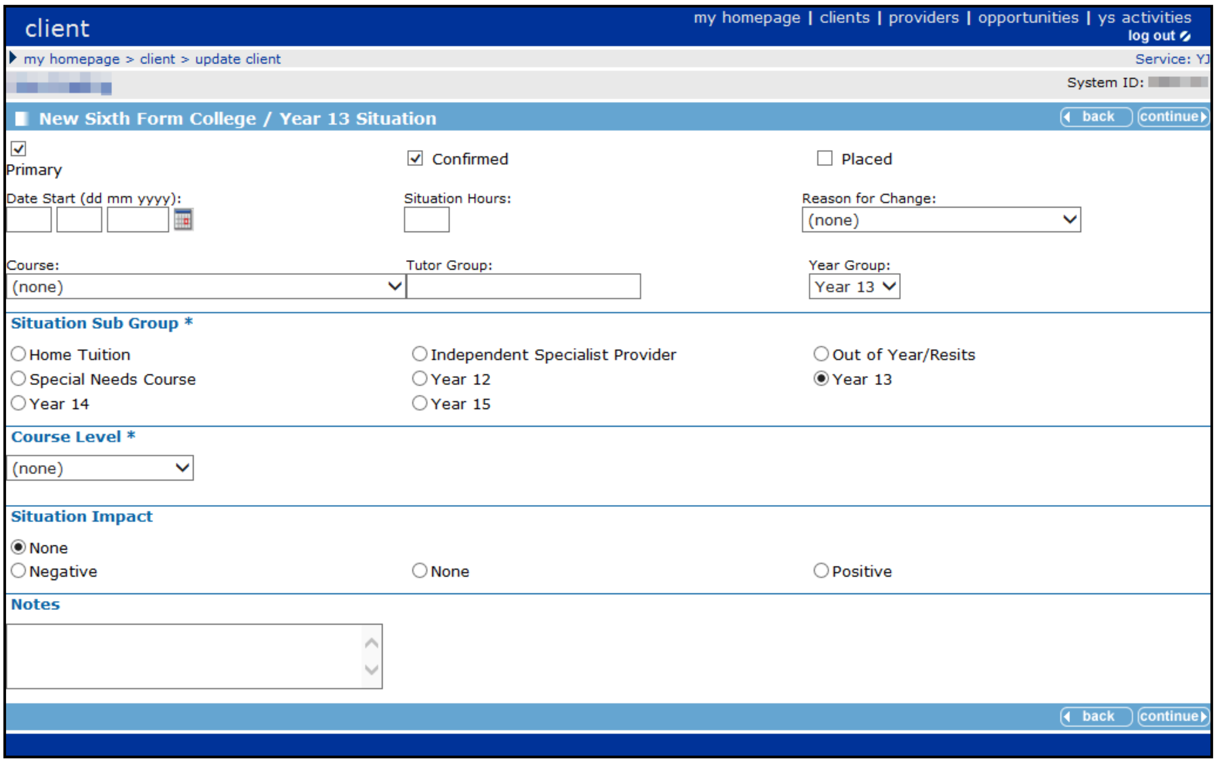
6. Enter the client's sixth form education provider in the search box and click the **search** button to display the search results.



7. From the search results, select the client's sixth form education provider and click the **continue** button to display the **New Situation** dialog.



8. Select the client's current education year group and click the **continue** button to display the **New Sixth Form College** situation page.



9. Enter the details of the situation. Required items are marked with an asterisk (*).
10. Click the **continue** button to return to the **Change Situations** page.

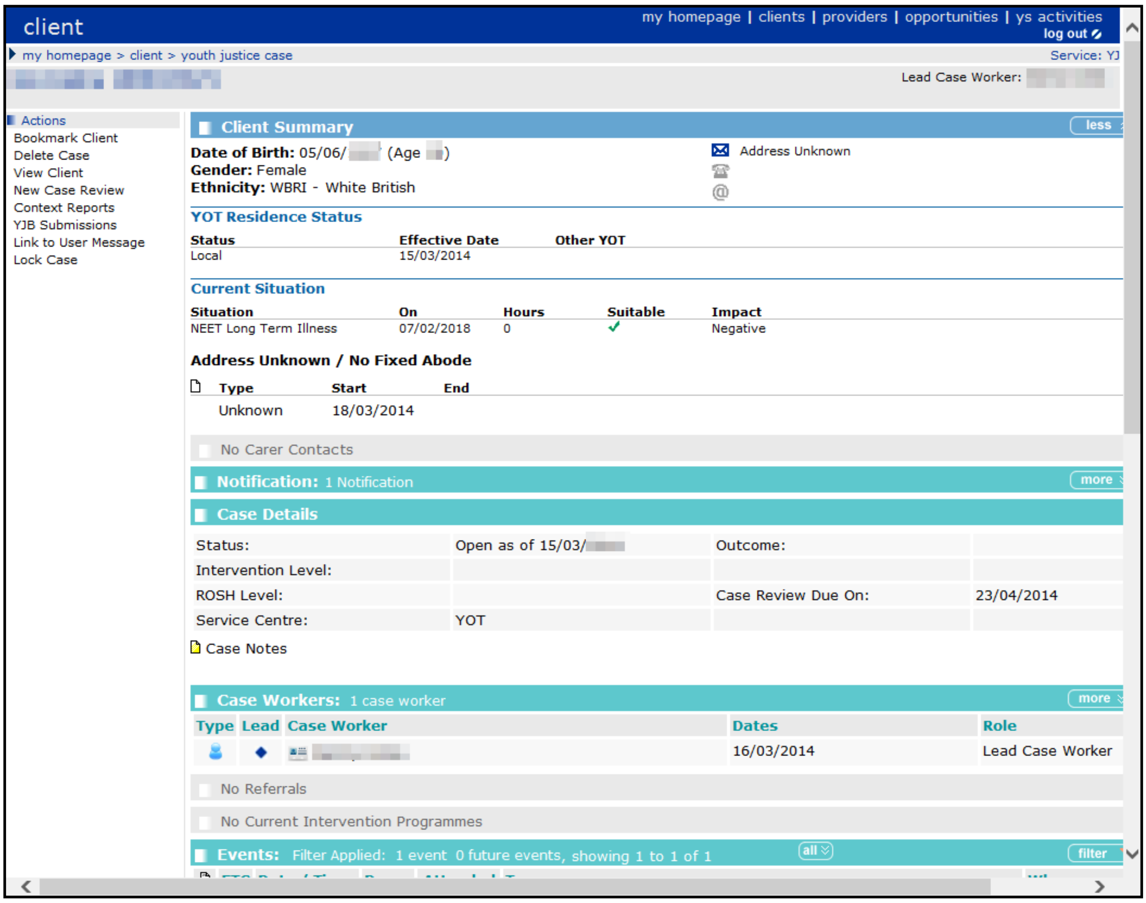
    The new situation is listed in the **Situation History** panel. Depending on the situation type, there might be reminders to complete additional tasks.
11. Click the **continue** button to return to the client record.

Editing ETE Status

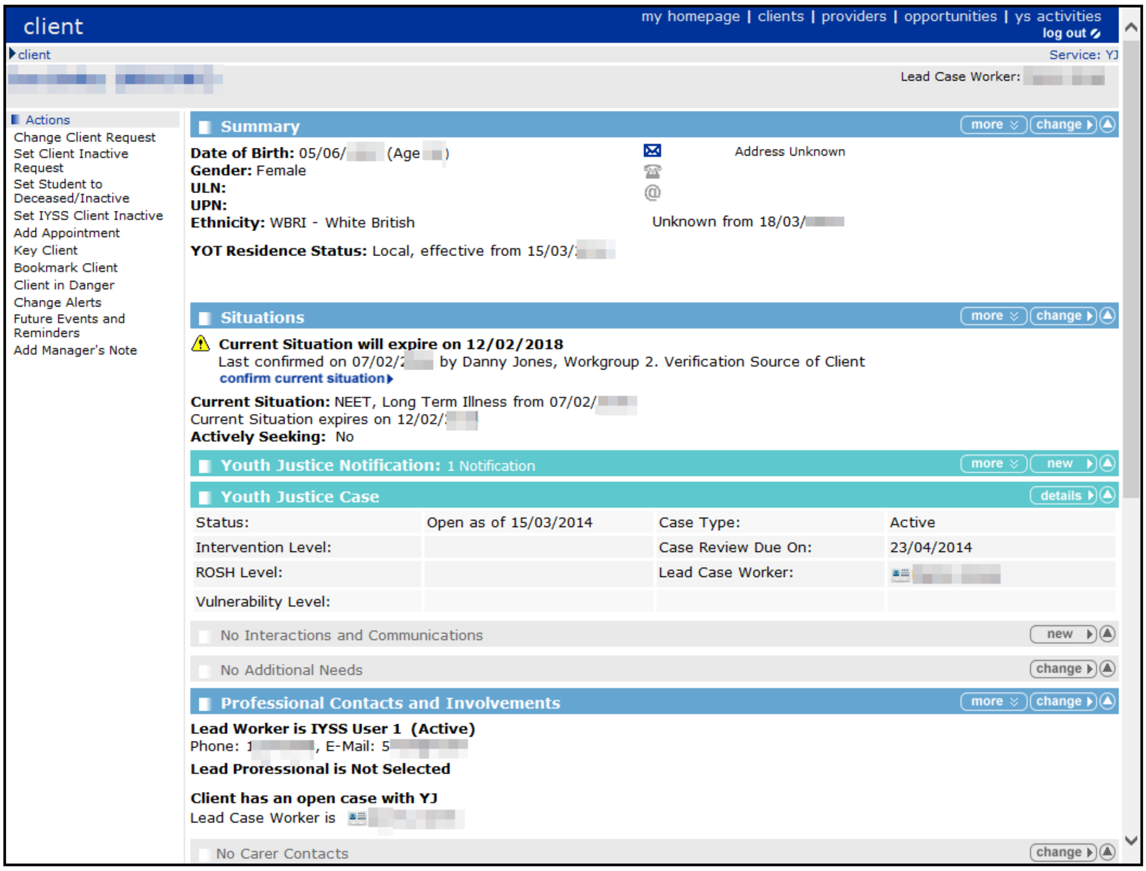
A client's current status regarding education, training or employment (ETE) is displayed in the **Situations** panel in the **Client Summary** screen. The **Current Situation** has an expiry date, to encourage the monitoring of end of school year activity and changes. The ETE hours (the time a client spends in ETE activity) must be recorded.

To record the ETE hours:

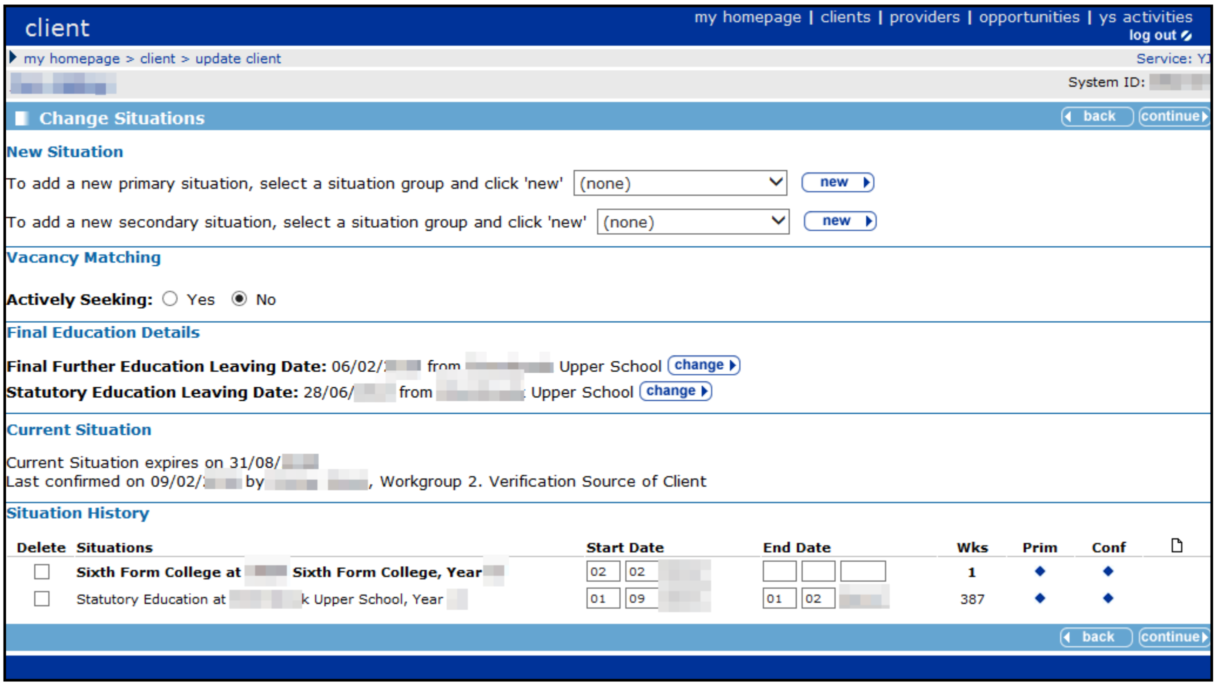
1. Access the required client case. For more information, see Accessing Client Records on page *13*.



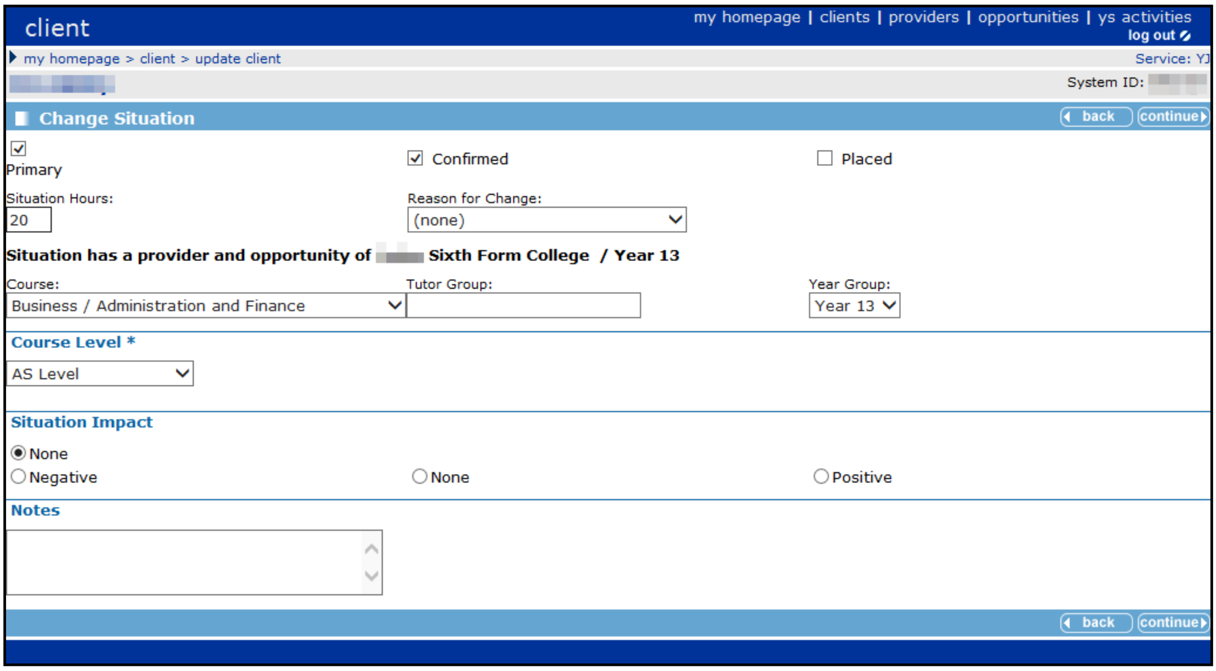
2. Click the **View Client** hyperlink in the **Actions** menu to display the client record.



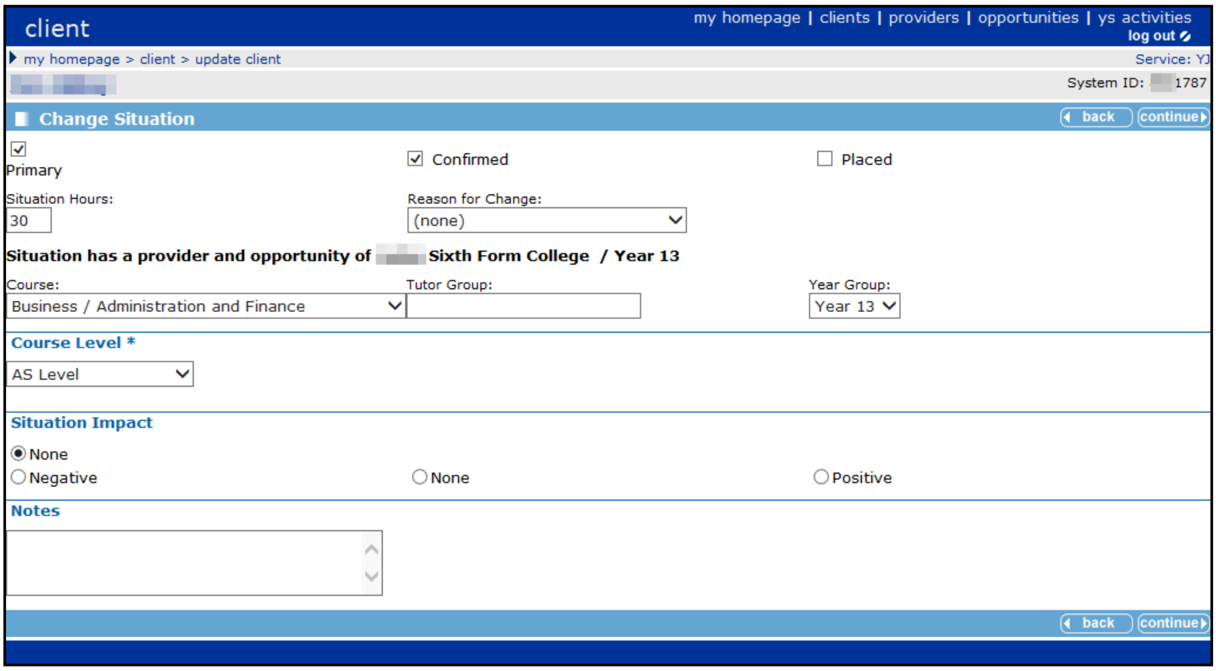
3. In the **Situations** panel, click the **change** button to display the **Change Situations** page.



4. Click the relevant link in the **Situation History** section to display the current details for the situation.



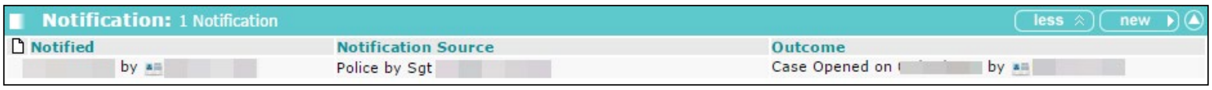
5. Enter or update the required information.



6. Click the **continue** button to save the information and return to the **Change Situations** screen.
7. Click the **continue** button to return to the **Client Summary** screen.
8. To return to the client case record, click the **details** button in the **Youth Justice Case** panel.

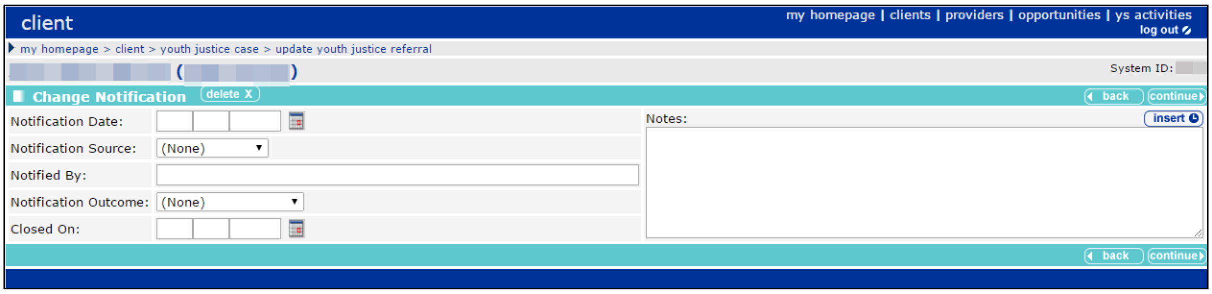
06 | Entering a New Notification

Notifications are displayed in the **Notification** panel along with the key names and dates. If a client does not have any notifications, the panel header is grey and reads **No Notifications**.



To record a new notification:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Notification** panel, click the **new** button to display a blank notification.



3. Enter the **Notification Date** in dd/mm/yyyy format or click the calendar icon to select it from the menu.
4. Select the **Notification Source**.
5. Enter the name of the notification source in the **Notified By** field.
6. If known, select the **Notification Outcome**.
7. If known, enter the **Closed On** date in dd/mm/yyyy format or click the calendar icon to select it from the menu.
8. Click **Continue** to save and return to **my homepage**

***NOTE**: Contact your System Administrator if you need new **Notification Source** or **Notification Outcome** options configuring.*

07 | Locking and Unlocking Records

Client records can be locked to prevent changes being made to the data. Users with the appropriate permissions can manually lock client records. These records remain locked until a user unlocks them

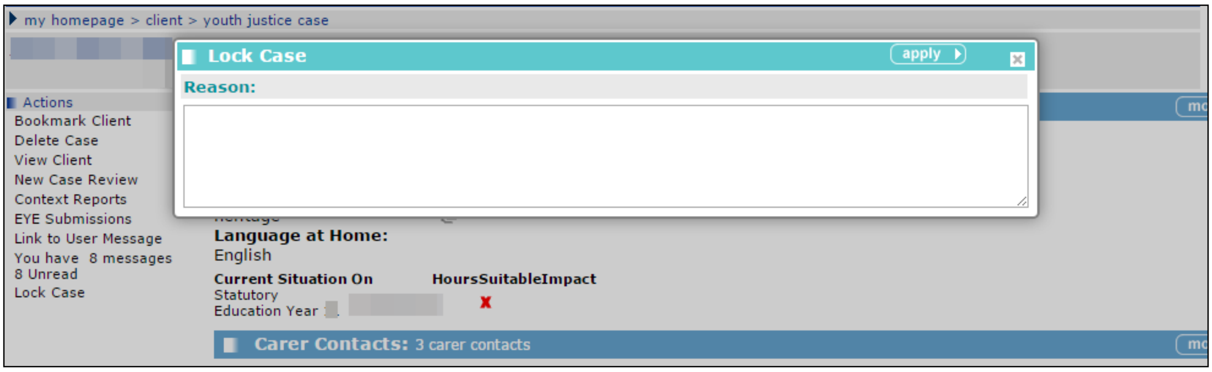
Client, opportunity and provider records are automatically locked out to other users while they are being edited. This prevents other people from entering information until the editing user has saved the changes. These records might remain locked if the session is terminated before the user has successfully logged out. Records locked in this manner are unlocked when the Cleanup job runs overnight, however they can also be unlocked by users with the 'User Security Details' permission through the IYSS web application.

Manually Locking a YJ Case Record

To lock a record, you need to have the 'YJ Case – Lock / Unlock' permission assigned. You can lock a record to prevent any changes being made to the data. For more information on permissions, refer to the *Editing Security Group Permissions* topic in the *Security Group* chapter of the *One IYSS System Administration Handbook*, available from the One Publication website (www.onepublications.com).

To lock a YJ Case record:

9. Access the required client record. For more information, see Accessing Client Records on page *13*.
10. In the **Actions** menu, click the **Lock Case** hyperlink to display the **Lock Case** dialog.



11. Enter a **Reason**.
12. Click the **apply** button to lock the case. The record is now locked and cannot be updated.

Unlocking a YJ Case Record

To unlock a record to allow changes to be made, you need to have the 'YJ Case – Lock / Unlock' permissions assigned. For more information on permissions, refer to the *Editing Security Group Permissions* topic in the *Security Group* chapter of the *One IYSS System Administration Handbook Part 1*, available from the One Publication website (www.onepublications.com).

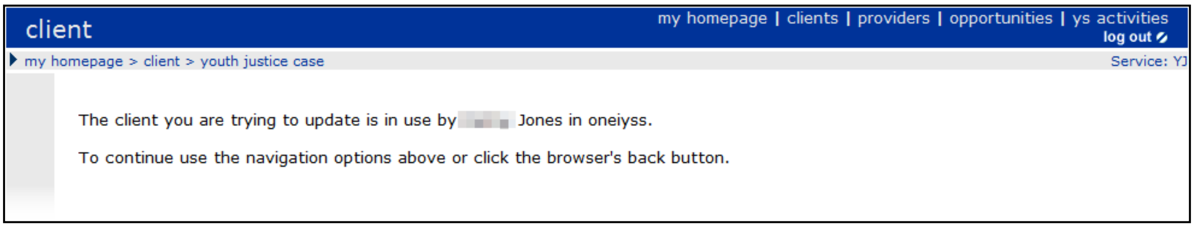
To unlock a client record:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Actions** menu, click the **Unlock Case** hyperlink to display a confirmation dialog.

3. Click the **OK** button to unlock the client record. The client record is now unlocked and can be updated.

Unlocking Records

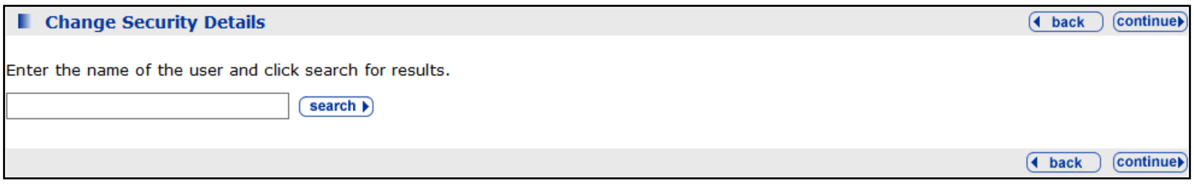
If a record is locked out, the following message is displayed to any users who attempt to edit it:



If you have the ‘Change User Security Details’ permission, you can unlock all records that are ‘in use by’ (i.e. locked out to) a certain user. Before unlocking records, ensure that this user has logged out of the system, as the process tidies up and unlocks <u>all</u> of that user’s active sessions and locked records.

To unlock the records:

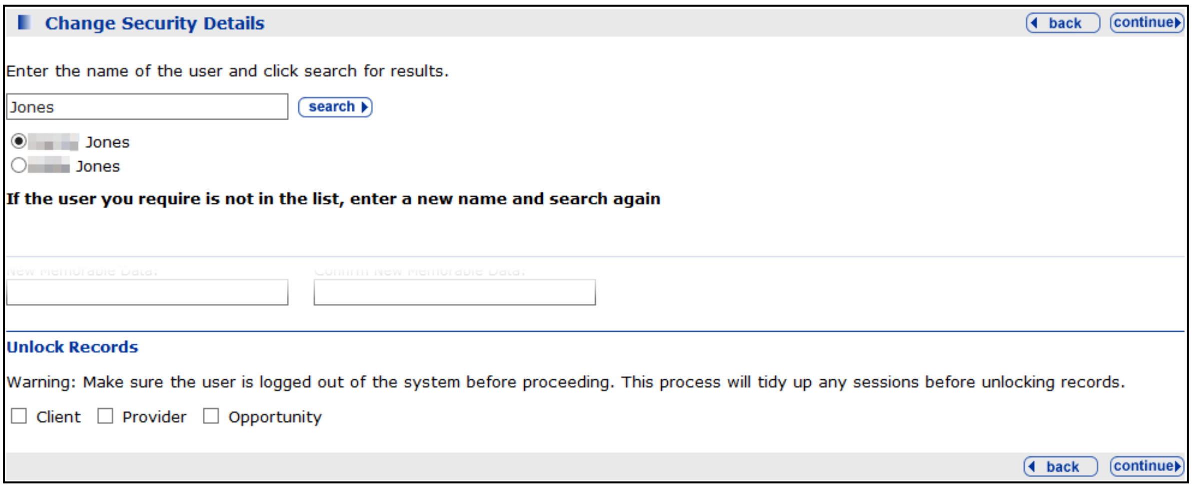
1. In the **IYSS Links** panel of my homepage, click the **User Security Details** hyperlink to display the **Change Security Details** page.



2. Enter the name of the user in the search field.
3. Click the **search** button to display the results.

4. Select the required user.

5. Click the **continue** button to display the security details below the results list.



6. In the **Unlock Records** panel, select the required check boxes.
7. Click the **continue** button. The records are unlocked and you are taken back to **my homepage**.

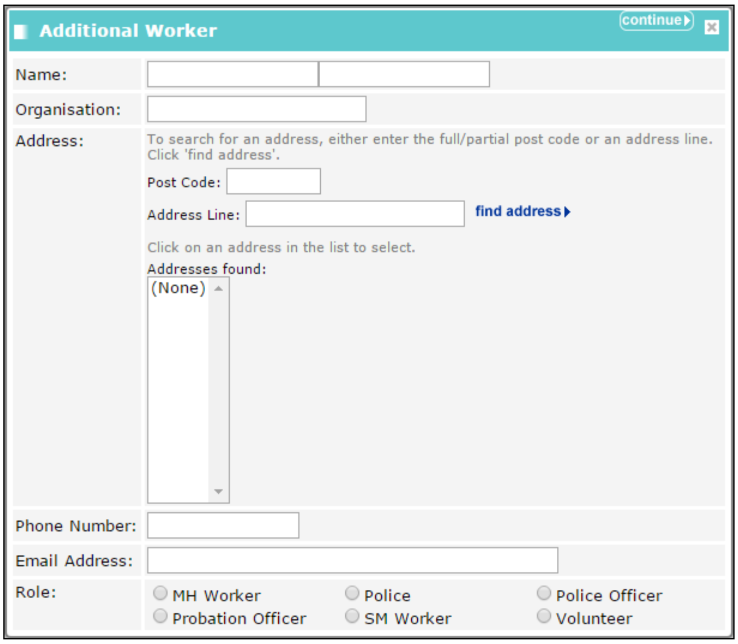
08 | Allocating Workers

A client's assigned case workers are displayed in the **Case Worker** panel on their client record. Until at least one worker is assigned, the panel header is grey and reads **No Case Workers**.

To allocate a new case worker:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Case Worker** panel, click the **new** button to access the **New Case Worker** screen.

3. If the worker is a registered Youth Justice user:
   a. Start typing the name of the **Worker** to display a list of registered case workers.
   b. Select the worker from the list of options.
4. If the worker is employed by a third party and is not a registered Youth Justice user:
   a. Click the **New Additional Worker** button to display the **Additional Worker** dialog.



   b. Complete the relevant fields.
   c. To enter an address:
      i. If known, enter the **Post Code**.

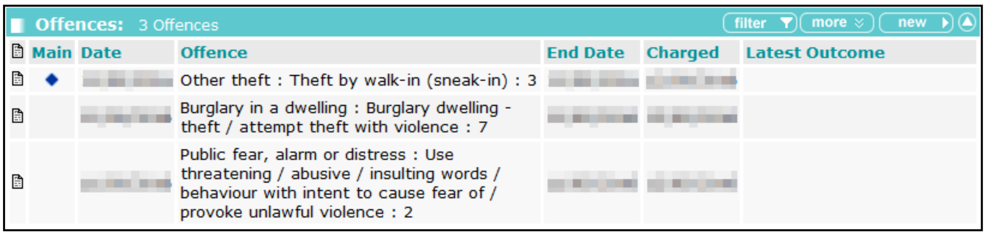
    ii. If known, enter the house number and street name.
    iii. Click the **find address** button to display a list of matches.
    iv. Select the appropriate address from the **Addresses found** list.
  d. Click the **continue** button to save the information and close the **Additional Worker** dialog.

5. Click the **continue** button to save the information and return to the client record.

09 | Offences

Entering a New Offence

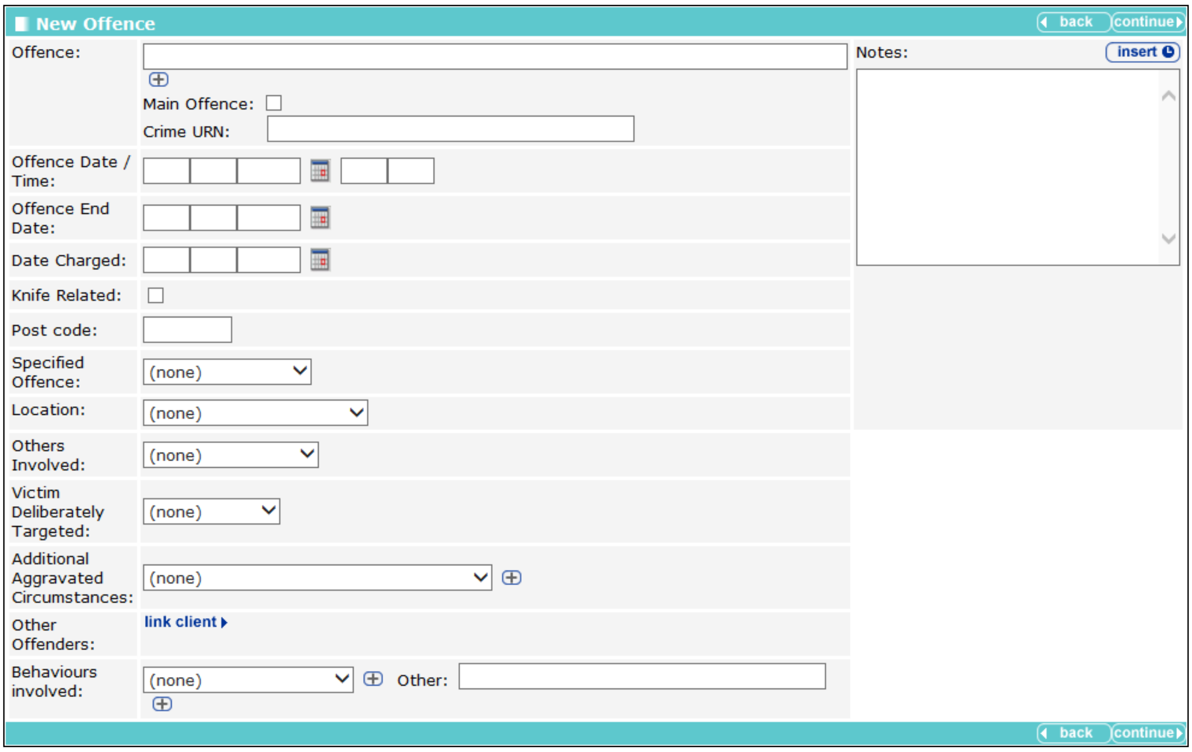
Offences can be added individually or, if they share the same date and time, multiple offences can be added at the same time. When adding multiple offences, each offence shares the same information, such as **Offence Date** and **Other Offenders**. However, once added, each offence can be edited individually via the **Offences** panel. If adding multiple offences, one offence should have the **Main Offence** check box selected. Until at least one offence is added, the panel header is grey and reads **No Offences**.



For more information on the criteria defining outstanding, current and historic offences, see Appendix A: Offences and Episodes on page *134*.

To add a new offence:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Offences** panel, click the **new** button to display the **New Offence** screen.



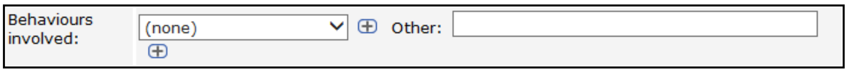
3. Start typing the name of the **Offence** to display a list of options, or enter the PNLD code.
4. Select the required offence.

5. If applicable, select the **Main Offence** check box and enter the **Crime URN**.
6. Click the **+** icon to add the offence.
7. To add additional offences, repeat steps 2-6.
8. Complete the remaining relevant fields.
9. If required, complete the **Additional Aggravated Circumstances** field:
   a. Select the item from the menu.
   b. Click the **+** icon to add the circumstance.
   c. If required, repeat steps a and b to add additional circumstances.
10. If required, add other offenders:
    a. Click the **link client** button to display the **Add Other Offender** screen.

    b. Enter as much information as you know.
    c. Click the **Search** button to reveal people matching the criteria you entered.
    d. Select the radio button next to the person you wish to add.
    e. Click the **continue** button to save the information and return to the **New Offence** screen.

> ***NOTE:*** *The co-defendants must be available within YJ prior to being added to an offence. Adding a co-defendant does <u>not</u> automatically update the co-defendant's record with the new offence. You must manually add the same offence into the co-defendant's YJ case.*

11. To add behaviours to the offence:
    a. Select the behaviour from the **Behaviours involved** drop-down, or enter it into the **Other** field.
    b. Click the **+** icon next to the drop-down or **Other** field. Depending on your screen resolution, the **+** icon for the **Other** field may be below the drop-down:



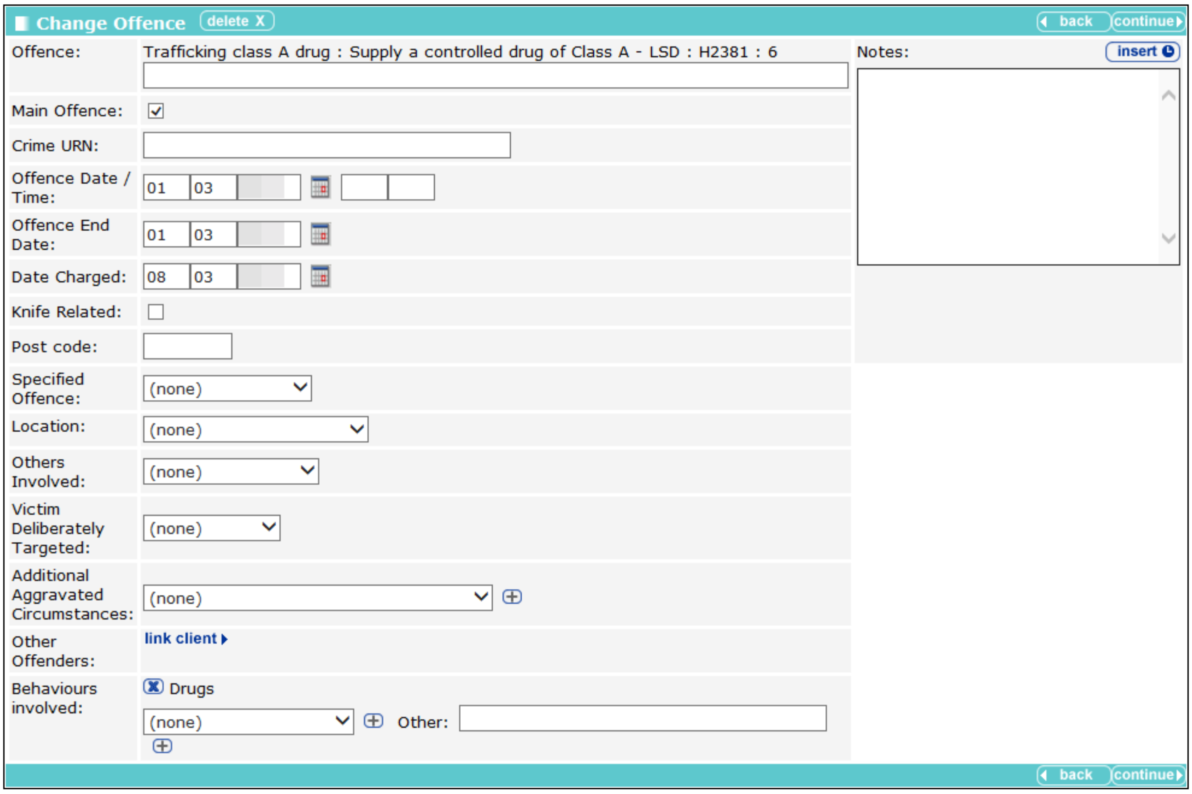
    c. Repeat steps a-b to add any additional behaviours.
12. Click the **continue** button to save the offence and return to the client record.

Updating an Existing Offence

To update an existing offence:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.

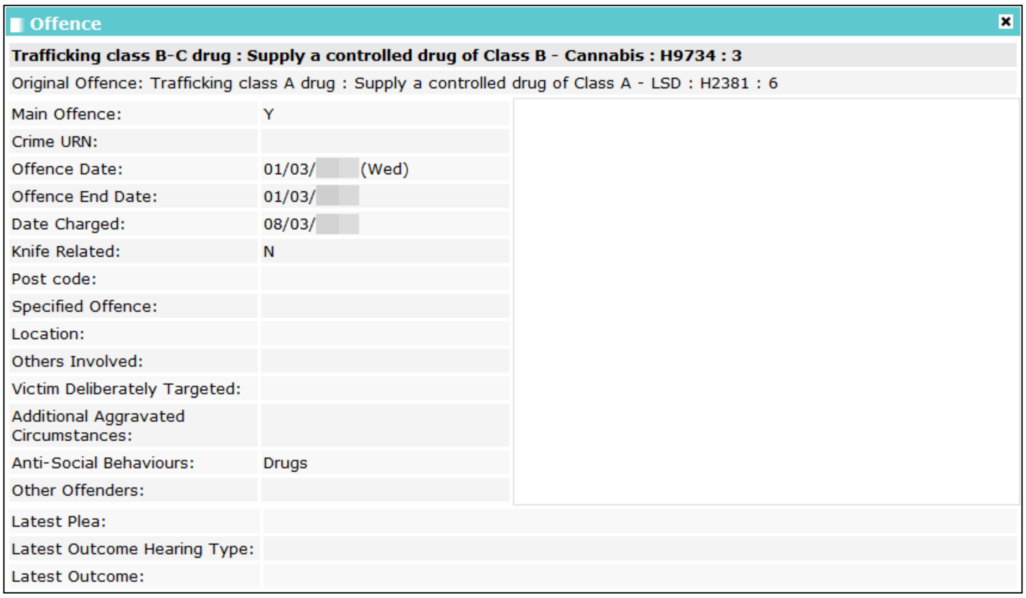
2. Click the relevant offence in the **Offences** panel to display the **Change Offence** screen.



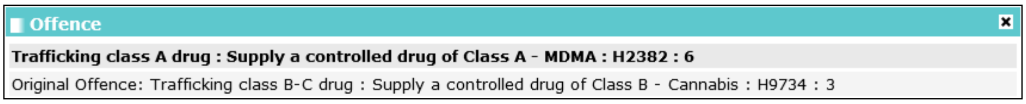
3. Add or amend any additional information.
4. Click the **continue** button to return to the client record.

   The updated offence can be viewed by clicking the relevant notes icon in the **Offences** panel.

   If you changed the offence type in the **Offence** field, the previous offence is displayed in the **Offence** dialog:



If you change the offence type again, the **Original Offence** field is also updated to display the most recent offence. <u>It will no longer display the first offence entered into the offence record.</u>



Knife Related Offence

To assist in the capture and reporting of knife related crime to the YJB, the Knife Related tick box in the offence details screen will be automatically ticked and cannot be manually unticked, for the following offences specified by the YJB:

The List of the 11 offences are as below.

CJS Code	Knife offence description
CJ88117	Possess knife blade or sharply pointed article
CJ88136	Possess article with blade / point on school premises
CJ88144	Possess knife blade / sharp pointed article in a public place - Criminal Justice Act 1988
CJ88145	Possess article with blade / sharply pointed article on school premises
CJ88146	Threaten a person with a blade / sharply pointed article on school premises
CJ88146B	Aid abet a person to threaten with a blade / sharply pointed article on school premises
CJ88148	Threaten a person with a blade / sharply pointed article in a public place
CJ88148B	Aid abet a person to threaten with a blade / sharply pointed article in a public place
PR52044	Unauthorised possession in prison of knife or offensive weapon
RE59023	Manufacture / sell / hire / possess / offer a flick / gravity knife
VC06003	Use another to look after / hide / transport an offensive weapon / knife / blade - Violent Crime Reduction Act 2006

***Note:** Users can manually tick or untick the Knife Related tick box for any other offence types as needed.*

10 | Pre-court Interviews and Decisions

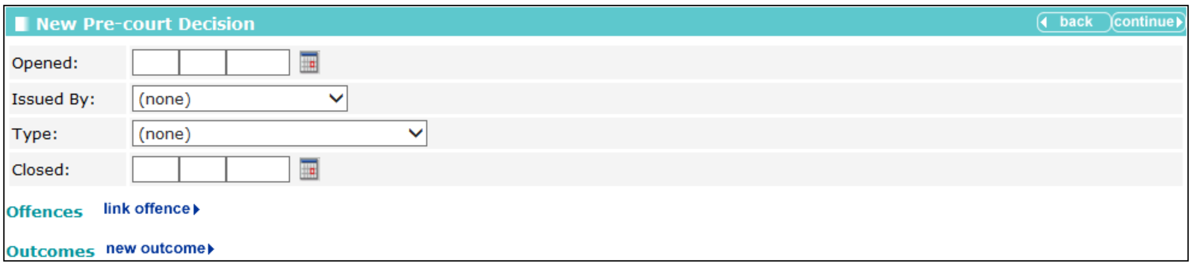
Entering a Pre-court Decision

Pre-court decisions are displayed in the **Pre-court Interviews and Decisions** panel. If your client has neither, the panel header is grey and reads **No Pre-court Interviews and Decisions**.

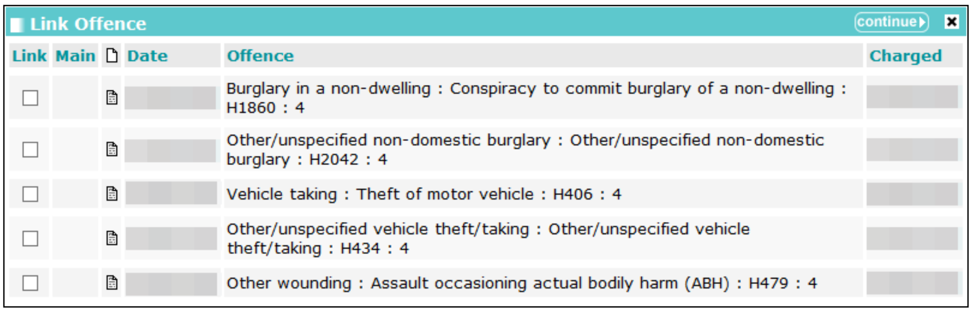
To create a new pre-court decision:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Pre-court Interviews and Decisions** panel, click the **new** button to display the **Pre-court Decisions** screen.

New Decision button



3. Complete the appropriate fields.
4. Click the **Link Offence** button to display the **Link Offence** dialog.



5. Select the relevant offences.
6. Click the **continue** button to save the offences and close the dialog.
7. To record an outcome:
   a. Click the **new outcome** button to display the **Outcome** dialog.

b. Select the **Outcome** from the drop-down.

c. If this is the main outcome for the pre-court decision, select the **Main** check box.

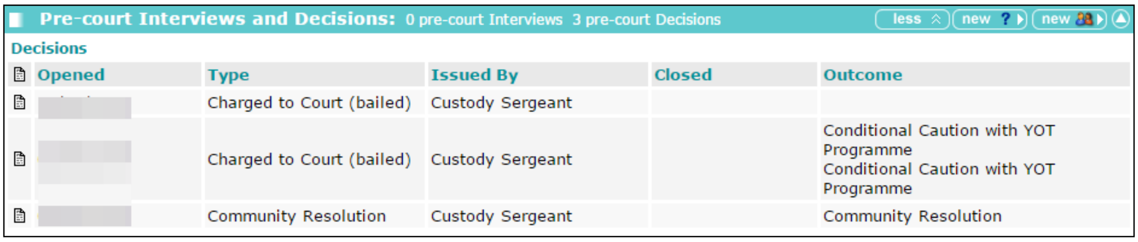
d. Select the **Offence** with which the outcome is associated.

e. Click the continue button to save the outcome and close the dialog.

8. Click the **continue** button to save the decision and return to the client record.

Entering a Pre-court Interview

Pre-court interviews are displayed in the **Pre-court Interviews and Decisions** panel.

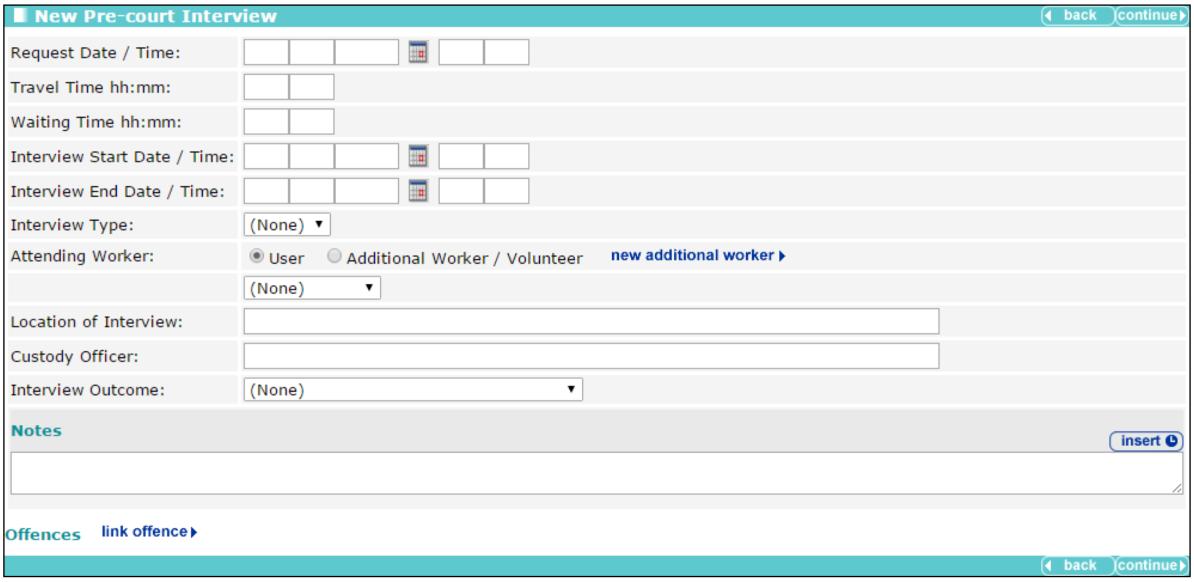


To create a new pre-court interview:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.

2. In the **Pre-court Interviews and Decisions** panel, click the **new** button to display the **Pre-court Interviews** screen.

New Interview button



3. Complete the appropriate fields.

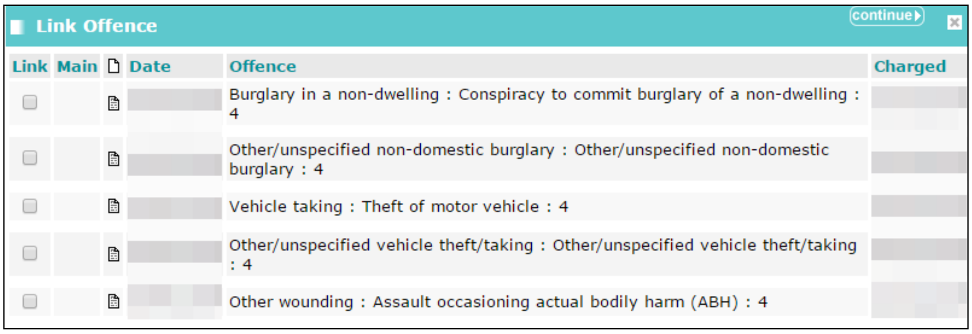
- If the attending worker was a registered Youth Justice user:

  i. Select the **User** radio button.

   ii. Select the worker from the menu.

- If the attending worker was not a registered Youth Justice user:
   i. Select the **Additional Worker / Volunteer** radio button.
   ii. Select the worker from the menu
   iii. If the worker is not available from the menu, click the **new additional worker** button to create a record for the worker. If you need help completing this step, see step 4 in Allocating Workers on page *30*.

4. Click the **link offence** button to display the **link offence** dialog.



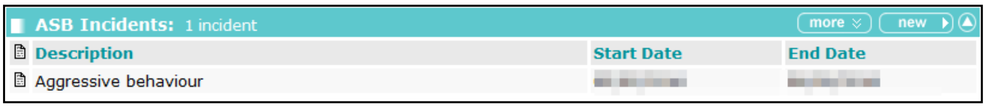
Link Offence continue

Link	Main		Date	Offence	Charged
				Burglary in a non-dwelling : Conspiracy to commit burglary of a non-dwelling : 4	
				Other/unspecified non-domestic burglary : Other/unspecified non-domestic burglary : 4	
				Vehicle taking : Theft of motor vehicle : 4	
				Other/unspecified vehicle theft/taking : Other/unspecified vehicle theft/taking : 4	
				Other wounding : Assault occasioning actual bodily harm (ABH) : 4	

5. Denote the relevant offences by selecting the appropriate check boxes.
6. Click the **continue** button to save the offences and close the dialog.
7. Click the **continue** button to save the decision and return to the client record.

11 | Antisocial Behaviour

Antisocial behaviour is recorded in the **ASB Incidents** panel. Until at least one incident is recorded, the panel header is grey and reads **No ASB Incidents**.

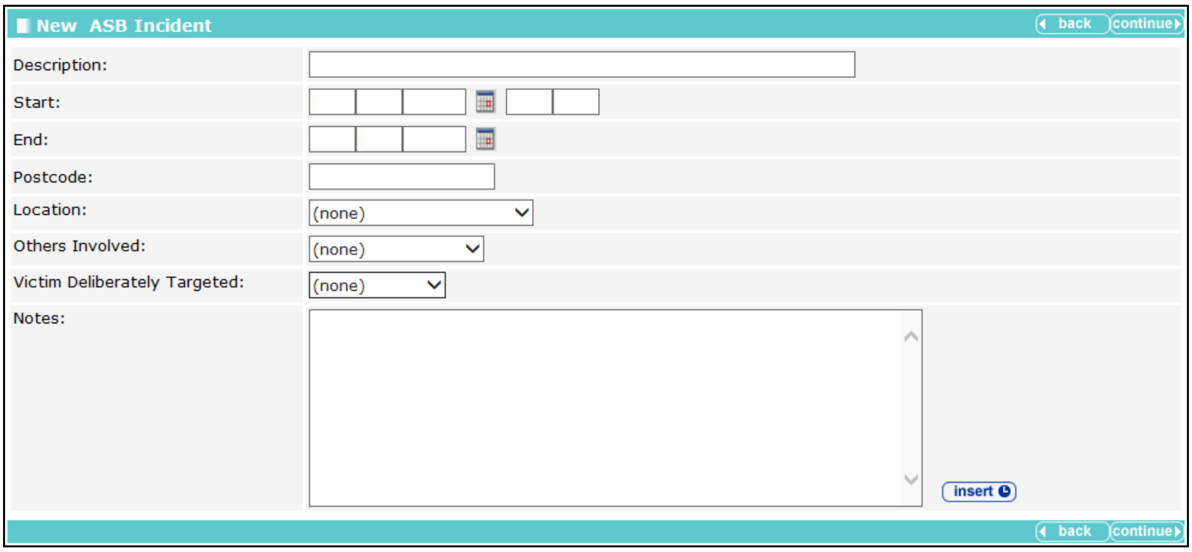


Antisocial behaviour incidents can only be marked as historic if they have been included in an episode within a completed AssetPlus stage. For more information on the criteria defining current and historic ASB incidents, see Appendix B: ASB Incidents and Episodes on page *135*.

Recording an Antisocial Behaviour Incident

To record an antisocial behaviour incident:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **ASB Incidents** panel, click the **new** button to display the **New ASB Incident** screen.



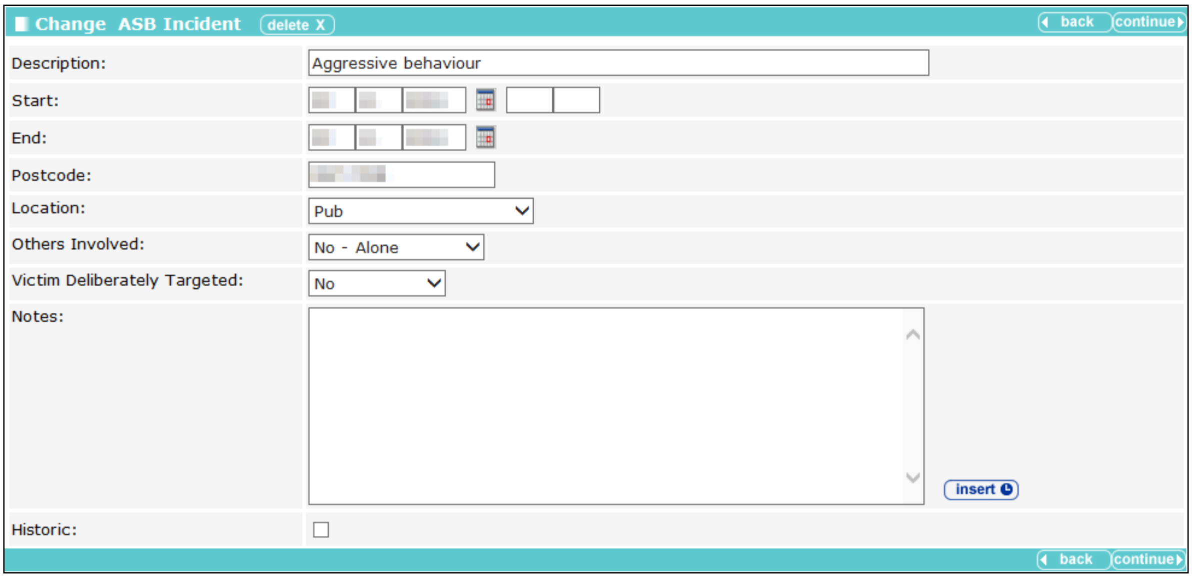
3. Enter a **Description** and **Start** and **End** dates.
4. As required, complete the other fields.
5. Click the **continue** button to save the incident and return to the Youth Justice case record.

Editing an Antisocial Behaviour Incident

To edit an antisocial behaviour incident:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.

2. In the **ASB Incidents** panel, click the antisocial behaviour **Description** to display the **Change ASB Incident** screen.



3. Update the details as required.

> ***NOTE:*** *The* ***Historic*** *check box is only available if the episode has been included in an episode within a completed AssetPlus stage.*

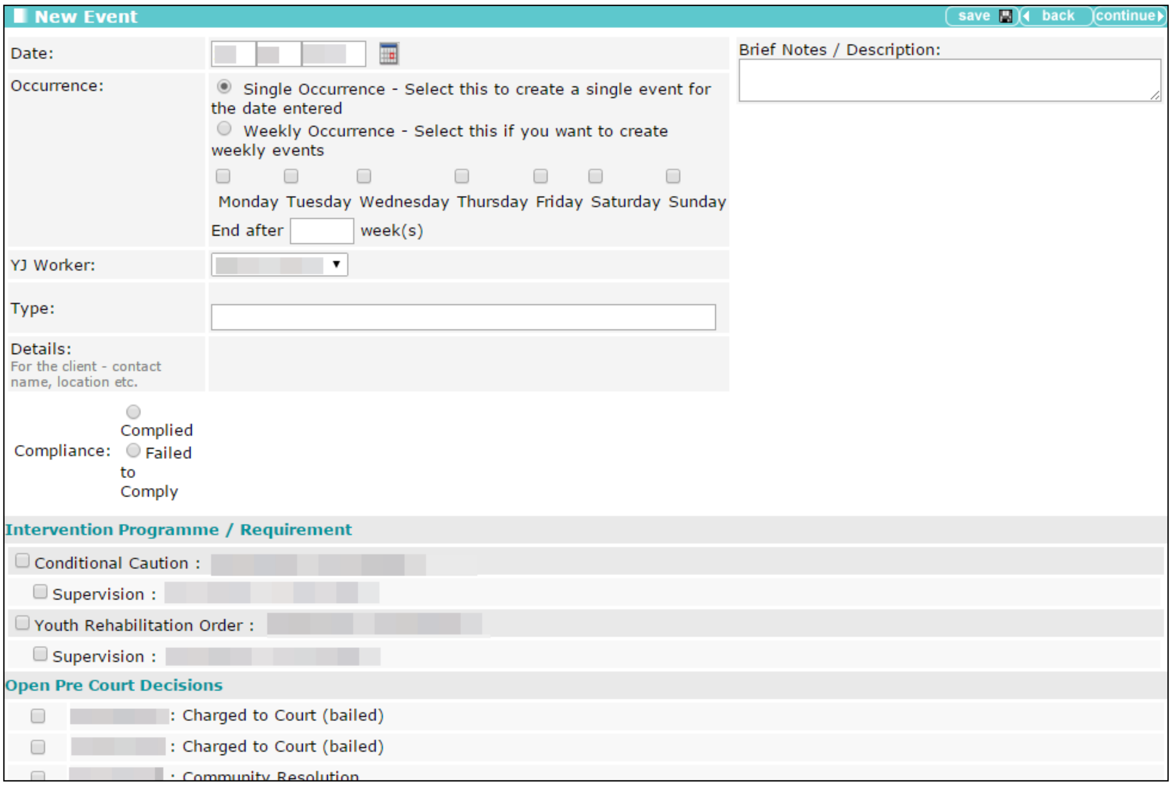
4. Click the **continue** button to save the changes and return to the client's Youth Justice case record.

12 | Events

The Events section of Youth Justice enables the recording of all correspondence, intervention contacts, key processes and case diary entries relevant to the young person. Each event can be linked to the relevant pre-court decision or intervention programme or can be left unlinked completely. The events are displayed in chronological order with the most recent being shown at the top. Until at least one event is added, the panel header is grey and reads **No Events**.

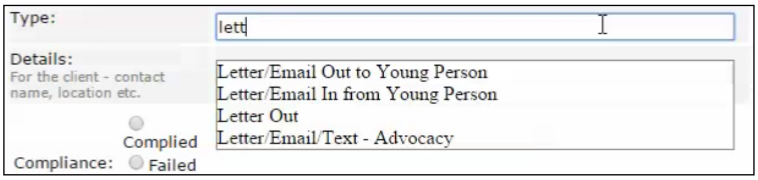
Creating a New Event

1. Access the required client record. For more information, see [Accessing Client Records]() on page *13*.
2. In the **Events** panel, click the **new** button to display the **New Event** screen.

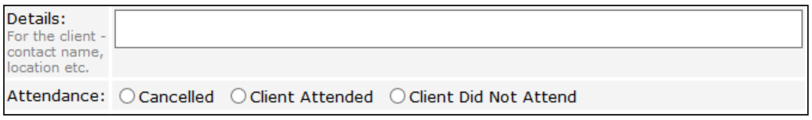


3. Complete the **Type** field.

> ***NOTE***: *Enter the first few letters of the event type in the* ***Type*** *field and a range of options is displayed. You must select one of these options; this is not a free text entry field. Once an option is selected, additional fields that require completing are displayed.*



After the **Type** field has been completed, if appropriate for the type, the **Details** text entry field becomes active and an **Attendance** field is displayed.



4. If required, complete the **Details** field.
5. Indicate the client's **Attendance** by selecting the appropriate radio button.
6. If the **Client Did Not Attend** radio button was selected, a **Did Not Attend Reason** field is displayed. You must indicate whether the reason was **Acceptable** or **Not Acceptable** by selecting the appropriate radio button.
7. If the **Client Attended** or the **Client Did Not Attend** radio button is selected, select the appropriate **Compliance** radio button.

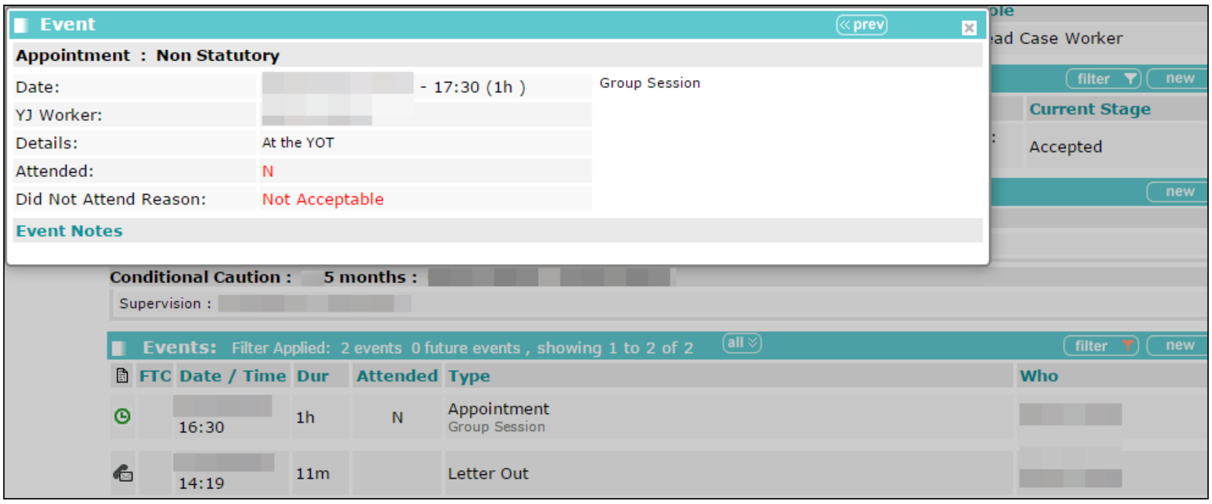
> ***NOTE:*** *If the event was cancelled, the* ***Compliance*** *field is removed.*

8. Select the appropriate **Intervention Programme / Requirement** and **Open Pre Court Decisions** check boxes.
9. Click the **continue** button to save the event and return to the client record.

Viewing an Event

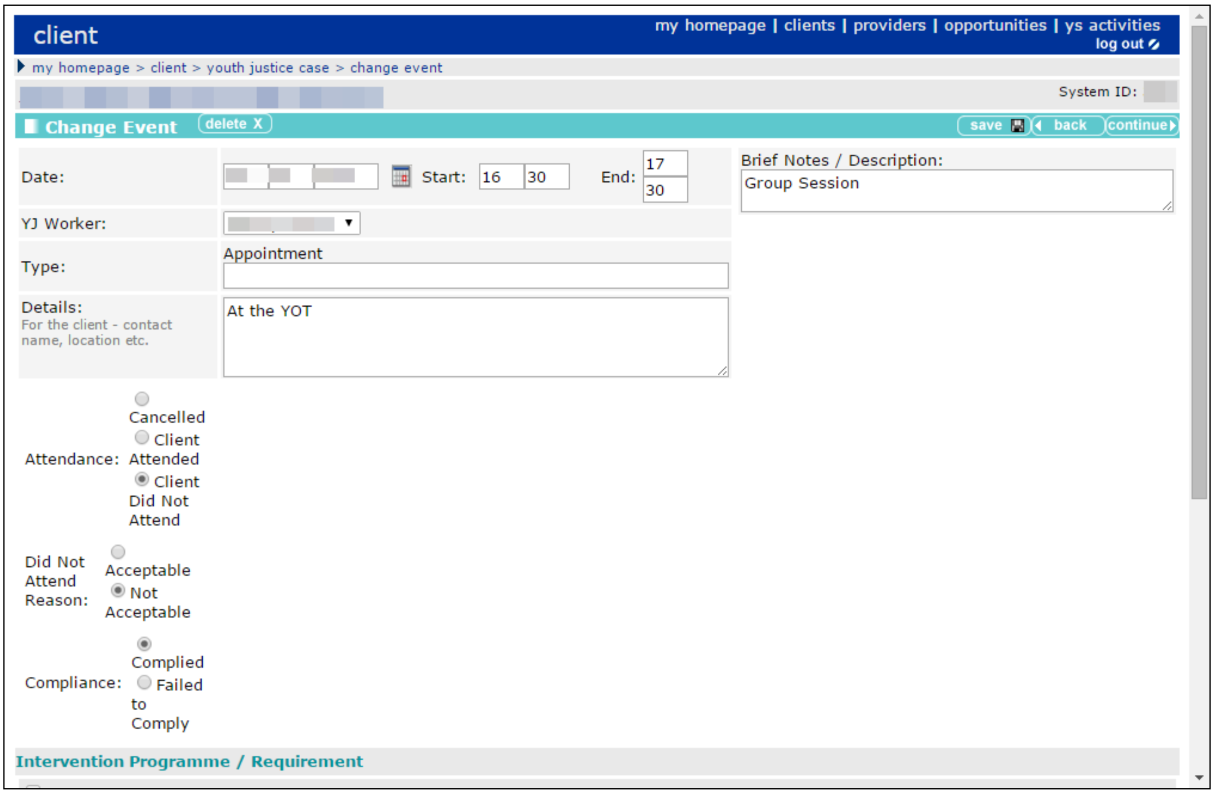
1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Events** panel, click the relevant icon in the left-hand column of the table to display the **Event** dialog.

3. To close the dialog, click the **x** button in the top right-hand corner of the dialog or click anywhere outside the dialog.



Editing an Event

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Events** panel, click the date and time of the relevant event to display the **Change Event** screen.



3. Update the information as required. For more information on completing the **Change Event** screen, see [Creating a New Event](#) on page *41*.
4. Click the **continue** button to save the event and return to the client record.

NOTE*: If the client failed to attend or were noncompliant at a statutory appointment and you need to put them through the breach process, see [Managing Breaches](#) on page* 80.

Bulk Updating Events

Introduction

You can add events to multiple client records if the event details being added are the same for each client. If there are minor variations for certain clients, such as one of the clients did not comply, you can amend the individual client record after performing the bulk update. Only users with the following Client Bulk Update permissions can use the YJ bulk update functionality:

- BU - YJ Events
- Bulk Update Client

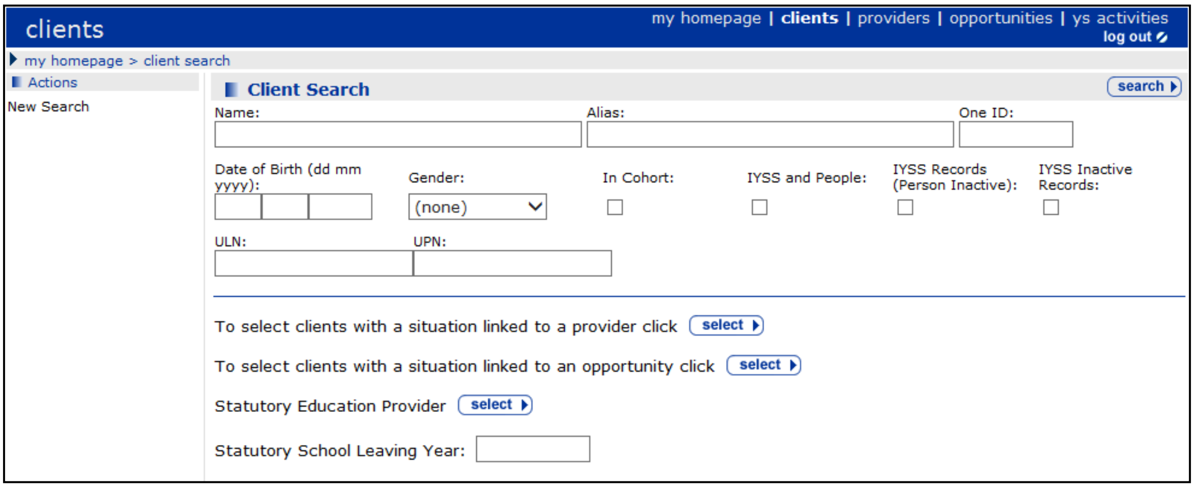
Before bulk updating clients, you must first add them to a client group.

Creating a Client Group

Client groups are temporary, and are cleared down when you end your current YJ session. You can save a group as a list for future use if required.

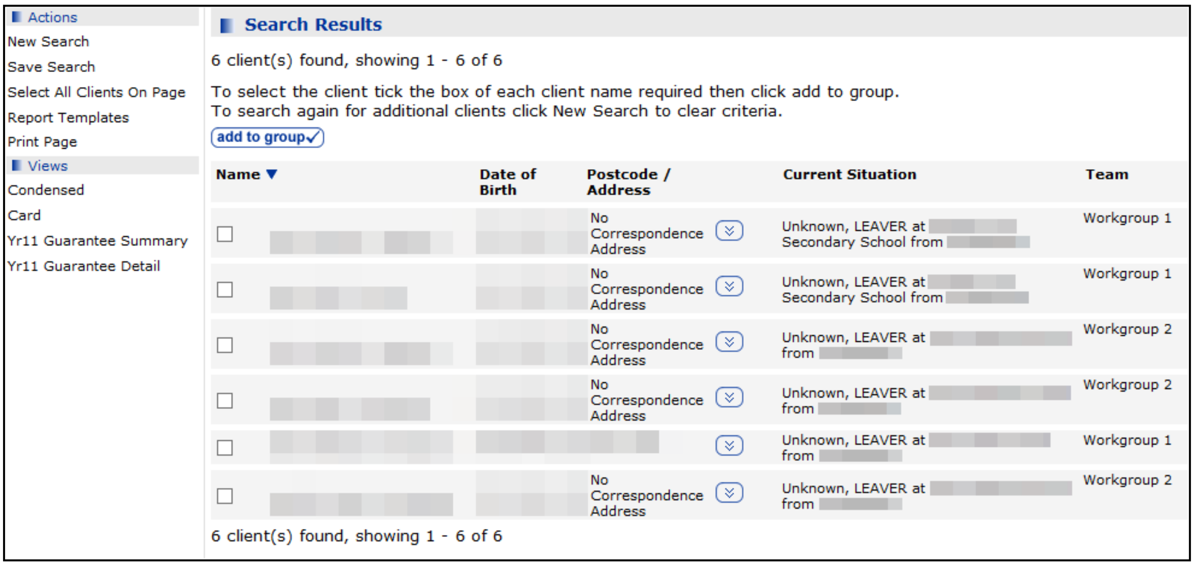
To create a client group:

1. In the One Youth Justice, Click the **clients** hyperlink at the top of the screen to display the **Client Search** screen.

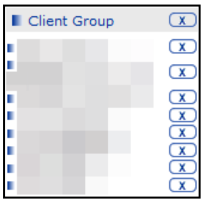


2. Enter the client's **Name**.

3. Click the **search** button to display the **Search Results** screen.



4. Select the required client.
5. Click the **add to group** button to add the client to the **Client Group** panel on the left-hand side.
6. In the **Actions** menu on the left-hand side, click the **New Search** hyperlink to return to the **Client Search** screen.
7. Repeat steps 2-6 until all required clients have been added to the **Client Group** panel.



***NOTE:** To remove clients from the group, click the **X** icon next to their name.*

8. If required, save the list for future use. For more information, see Saving Client Lists on page *45*.

Saving Client Lists

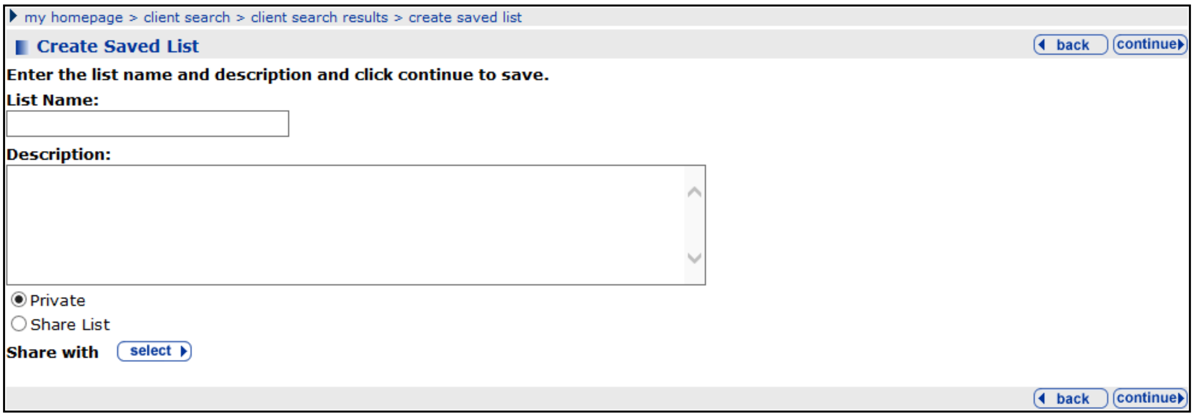
You can save lists for yourself or to share with others. To create a list for your own use, you must have the Create Saved List permission. To share the list with others, you must have the Create Shared Saved List permission.

To see the list in **my homepage**, you, and anyone with whom the list has been shared, must have the My Saved Client List permission.

To save a client list:

1. Create a client group. For more information, see Creating a Client Group on page *44*.

2. In the **Group Actions** menu, click the **Create Saved List** hyperlink to display the **Create Saved List** screen.



3. Enter a **List Name** and **Description**.
4. To share the list, select the **Share List** radio button and click the **select** button to select the required users.
5. Click the **continue** button to save the list and return to the **Search Results** screen.

   The client list can now be accessed from the **My Saved Client Lists** panel.

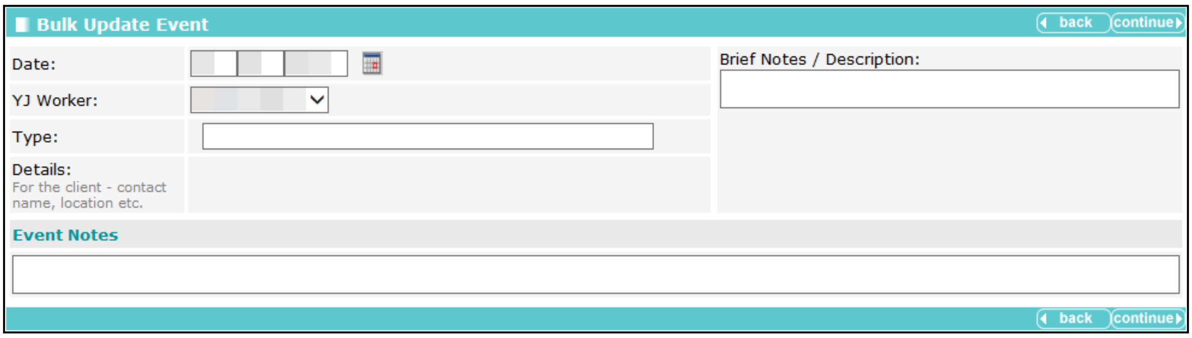
NOTE: *To use a client list, you must access the list through the **My Saved Client Lists** panel, and then add the clients to a new client group.*

Bulk Updating an Event

Bulk updating an event applies the event details to all clients in the group. If you need to edit the details for a single client following the bulk update, you can do so through their case record.

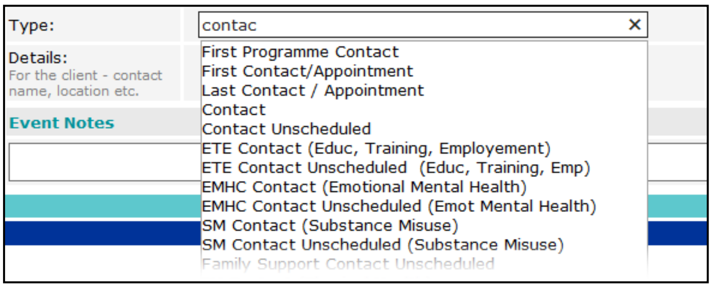
To bulk update an event:

1. Create a client group (see [Creating a Client Group](#) on page *44*, or [Saving Client Lists](#) on page *44*).
2. In the **Group Actions** menu, click the **Add Events** hyperlink to display the **Bulk Update Event** screen.

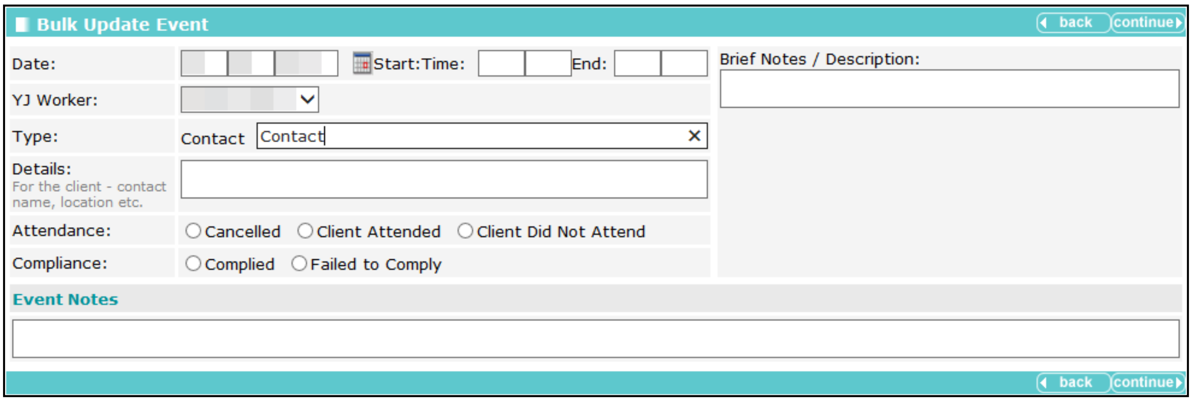


3. If required, amend the **Date** and **YJ Worker** fields.

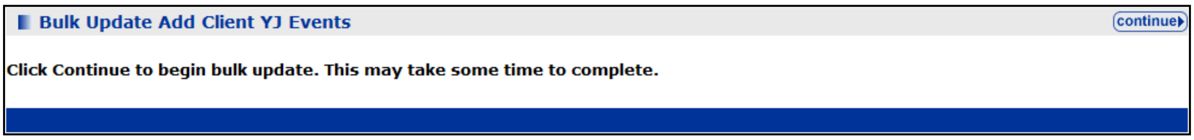
4. Complete the **Type** field. This is an auto-complete field.



5. If prompted, complete the **Start Time**, **Details**, **Attendance** and **Compliance** fields.

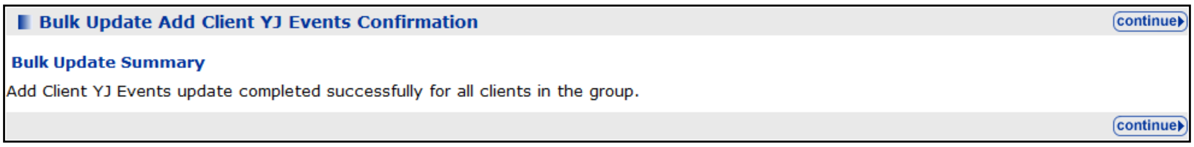


6. If required, complete the **Brief Notes / Description** field.
7. If required, add any **Event Notes**.
8. Click the continue button to display the **Bulk Updates Add Client YJ Events** screen.



9. Click the **continue** button to process the update.

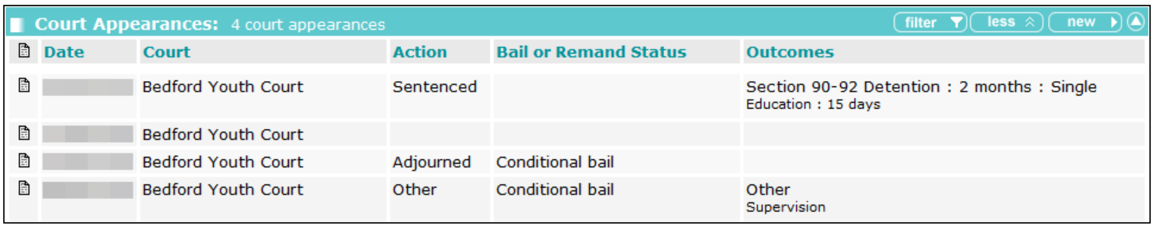
   A confirmation screen is displayed after the update has completed. Any clients for whom the bulk update could not be applied are listed here.



10. If required, edit the details for any individual clients through their case records.

13 | Court Appearances

Records of a client's appearances in court are displayed in the **Court Appearances** panel. For a client who has never had a court appearance record created, the panel header is grey and reads **No Court Appearances**. Click the more button to display older court appearances and more detail about each appearance.



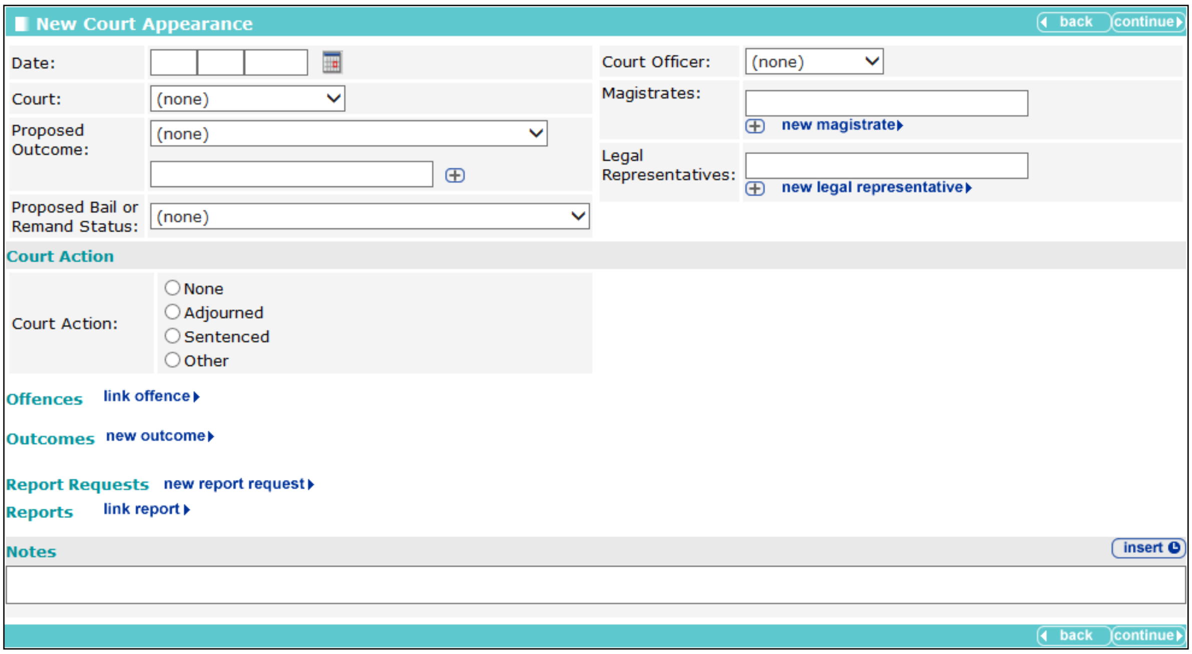
Date	Court	Action	Bail or Remand Status	Outcomes
	Bedford Youth Court	Sentenced		Section 90-92 Detention : 2 months : Single Education : 15 days
	Bedford Youth Court			
	Bedford Youth Court	Adjourned	Conditional bail	
	Bedford Youth Court	Other	Conditional bail	Other Supervision

Entering Court Appearances

When recording court appearances, if the **Next Court Date** and **Court** fields are completed, a new **Court Appearance** is created for this date. Any linked offences and reports are copied to the new record.

To create a new court appearance record:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Court Appearances** panel, click the **new** button to display the **New Court Appearance** screen.



3. Complete the appropriate fields.
4. To record magistrates already recorded in the Youth Justice system:
   a. Start entering the name in the **Magistrates** field. A list of available magistrates who match the entered text is displayed.

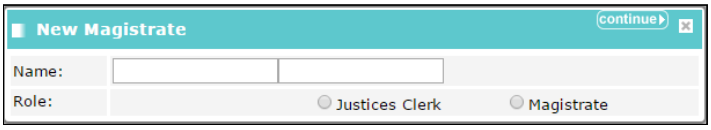
b. Select the magistrate from the list.

c. Click the **Add** button to add the magistrate.

 *Add button*

5. To record magistrates not already recorded in the Youth Justice system:

   a. Click the **New Magistrates** button to display the **New Magistrate** dialog.



   b. Enter the required information.

   c. Click the **Continue** button to return to the **New Court Appearance** screen.

6. To record the court action:

   a. If the session was adjourned, select the **Adjourned** radio button to enter the required information and automatically create a new court appearance for the upcoming session.

> ***NOTE**: If you enter a session as adjourned and complete the **Next Court Date** and **Court** fields, a new blank court appearance record is created for that date. To access this record, see* *Editing Court Appearances on page* 51.

   b. If the client was sentenced, select the **Sentenced** radio button and enter the required information.

   c. To record a different outcome, select the **Other** radio button to display a menu of alternatives.

7. To record legal representatives already recorded in the Youth Justice system:

   a. Start entering the name in the **Legal Representatives** field. A list of available representatives who match the entered text is displayed.

   b. Select the representative from the list.

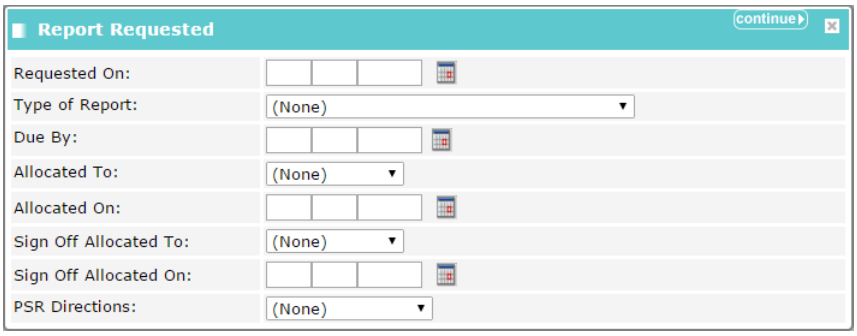
   c. Click the **Add** button to add the representative.

8. To record legal representatives not already recorded in the Youth Justice system:

   a. Click the **New Legal Representative** button to display the **Legal Representative** dialog.

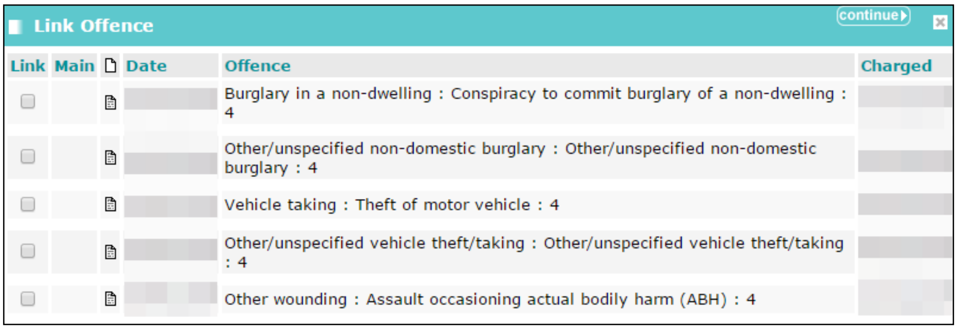
   b. Enter the relevant information.
   c. Click the **continue** button to return to the **New Court Appearance** screen.

9. If you are required to provide a report of the appearance for the court:
   a. Click the **new report request** button to display the **Report Requested** dialog.



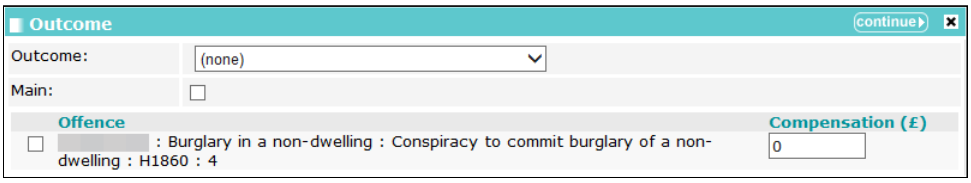
   b. Enter the relevant information.
   c. Click the **continue** button to save the information and return to the **New Court Appearance** screen.

10. To record the associated offences:
    a. Click the **link offence** button to display the **Link Offence** dialog.



    b. Select the relevant offences. For more information on recording offences see [Entering a New Offence](#) on page *32*.
    c. Click the **continue** button to save the offence and return to the **New Court Appearance** screen.
    d. If required, record the plea in the **Offence** panel.

11. To record an outcome:
    a. Click the **new outcome** button to display the **Outcome** dialog.



    b. Select the **Outcome** from the drop-down, and complete any additional fields this triggers.
    c. If this is the main outcome for the court appearance, select the **Main** check box.
    d. Select the appropriate **Sentence Type** radio button.
    e. Select the **Offence** with which the outcome is associated.
    f. If required, complete the **Compensation (£)** field.

g. Click the **continue** button to save the outcome and close the dialog.

12. To link a pre-existing report:

a. Click the **link report** button to display the **Link Report** dialog.

b. Select the relevant report.

c. Click the **continue** button to save the report and return to the **New Court Appearance** screen.

13. Click the **continue** button to save the event and return to the client record.

Viewing Court Appearances

To view a court appearance:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Court Appearances** panel, click the icon in the left-hand column of the table next to the relevant court appearance to display the **Court Appearance** summary dialog.

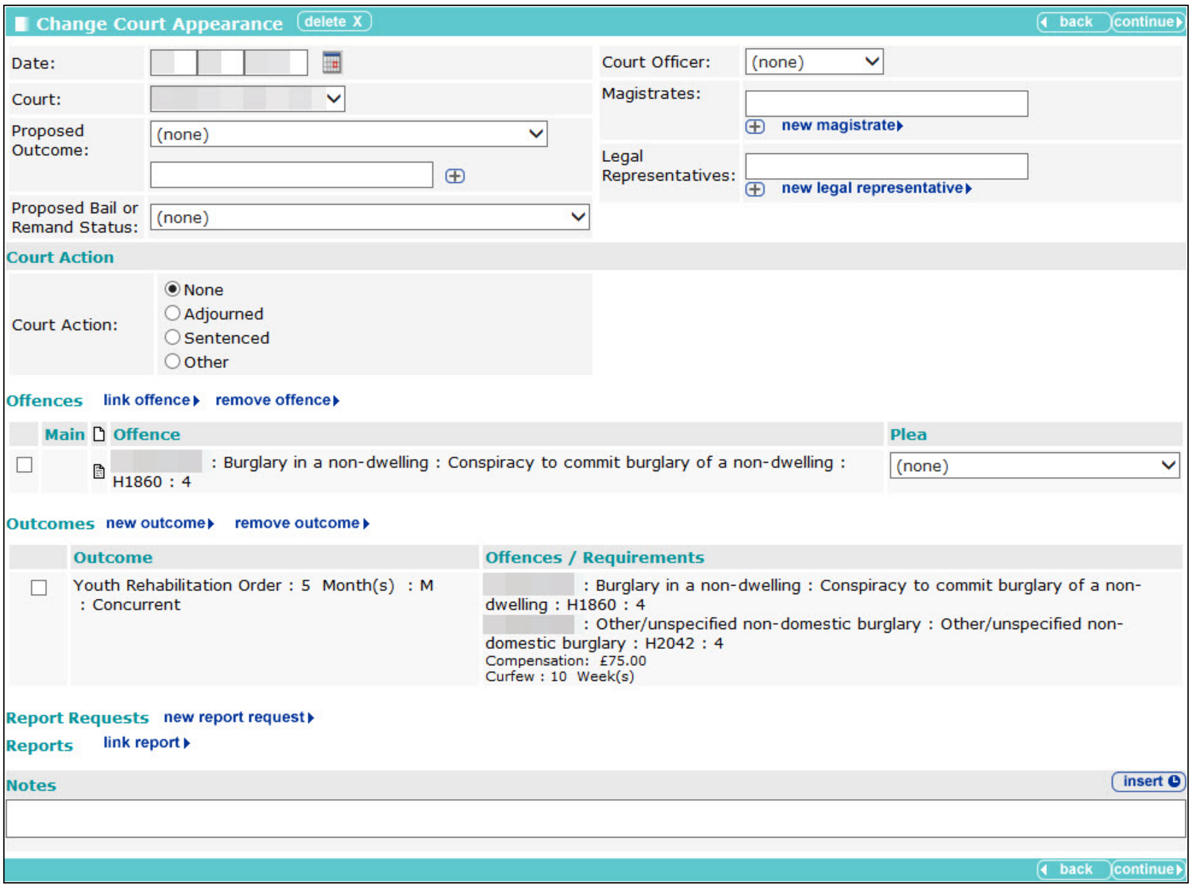
3. To close the dialog, click the **x** button in the top right-hand corner of the dialog or click anywhere outside the dialog.

Editing Court Appearances

To edit a court appearance:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.

2. In the **Court Appearances** panel, click the date of the desired record to display the **Change Court Appearance** screen.



3. Edit the relevant information. For more information on completing the **Court Appearance** screen, see Entering Court Appearances on page *48*.

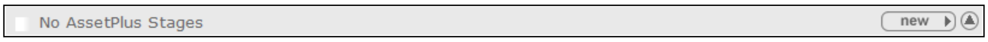
4. Click the **continue** button to save the event and return to the client record.

14 | AssetPlus

Introduction

This chapter provides guidance on completing AssetPlus stages within One YJ. For more information about AssetPlus, refer to the *AssetPlus Guidance* document, created by the YJB, or the *AssetPlus product notes*, available on the One Publications website.

AssetPlus data is recorded and edited in an AssetPlus stage via the **AssetPlus** panel. If there are no existing stages, the panel header is grey and reads **No AssetPlus Stages**.



Only one AssetPlus stage can be active at any given time. The stage draws on data existing in the client's core record. This data can be edited within the stage if required. If you need to record a new stage while an existing stage is still in progress, you must stop or complete the existing stage first. If you stop a stage, you cannot complete it, and will need to open a new stage and restart it.

Some AssetPlus modules are only available in certain stages. Modules in AssetPlus are displayed in blue in the stage section panel in AssetPlus stages.

The checkboxes displayed next to the sections and subsections are to assist you in manually tracking stage completion progress. You can select the checkbox after you have completed or reviewed a section or subsection to indicate that it is complete.

NOTE: *The checkboxes are for reference only. They are not part of the validation process and have no bearing on the completion of the stage or the data it contains.*

The **Referrals** and **Restorative Justice** modules apply to all stages. Other modules are stage-dependant. The following table lists the stage-dependant modules and the stages in which they are available:

Module	Available in Stage
Referral Order Panel Report	**Case Closure** (Only if active disposal is Referral Order.)
	Referral Order Report
	Review (Only if active disposal is Referral Order.)

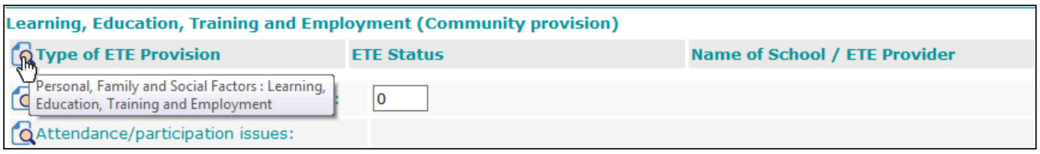
Module	Available in Stage
Custody	Bail Recommendation
	Entering Into Custody
	Placement Notification
	Post Court Report
	Pre-Sentence Report (All Options)
Bail and Remand	Bail Recommendation
	Post Court Report
Pre-Sentence Report	Pre-Sentence Report
	Pre-Sentence Report (All Options)
Leaving Custody	Pre-Release
YOT - YOT	Transfer YOT to YOT
YOT - Adult Services	Transfer to Probation

NOTE: *The module subsections are also stage-dependant, and are only displayed depending on the information requirements for each stage.*

The **Cross AssetPlus** icon, where displayed, enables you to quickly access related data held in other AssetPlus sections.

Cross AssetPlus icon

Hovering the cursor over the **Cross AssetPlus** icon displays a tool-tip with the location of the linked data (Section : Page). Click the icon to display the page containing the data.



Mandatory AssetPlus fields are indicated by an asterisk (*). AssetPlus pages and fields can be completed in any order, however you must complete the mandatory fields before a page can be saved or a stage can be completed.

Certain AssetPlus fields are trigger questions. If the response requires further information, additional fields are displayed.

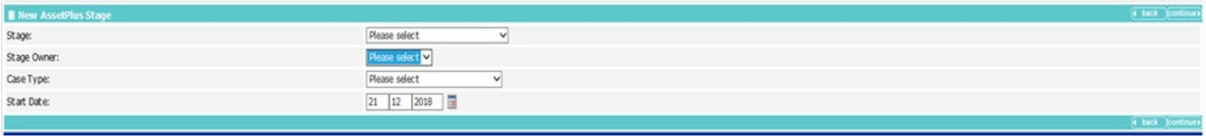
For information on how offence and ASB incident data is populated forward from stopped or complete stages to new stages, see Appendix A: Offences and Episodes on page *134* and Appendix B: ASB Incidents and Episodes on page *135*.

Creating a New AssetPlus Stage

To create a new AssetPlus stage:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.

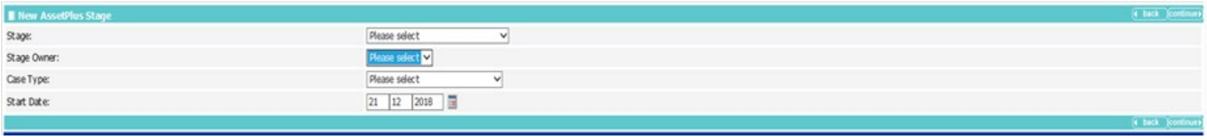
2. If this is the client's first stage, in the **AssetPlus** panel, click the **new** button to display the **New AssetPlus Stage** screen.



3. If the client has had previous stages:

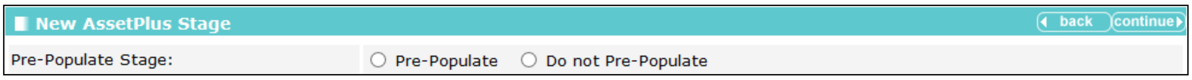
   a. In the **AssetPlus** panel, click the details button to display the most recent **AssetPlus Stage Summary**.

   b. In the **Actions** menu on the left-hand side, click the **Open Stage** hyperlink to display the **New AssetPlus Stage** screen.



   c. If you are given the option to pre-populate the stage, select the appropriate radio button.

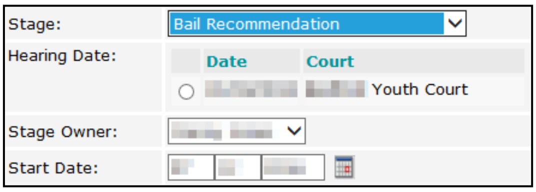
NOTE: *The **Pre-Populate Stage** option is only displayed for new stages following a case closure stage, and if your system administrator has configured it to do so. Pre-populating a stage pulls through all information entered in previous stages and records it in the new stage. All stages preceded by any other stage are automatically pre-populated. Regardless of whether the new stage is pre-populated or not, you should still ensure that all the relevant and current information is entered.*



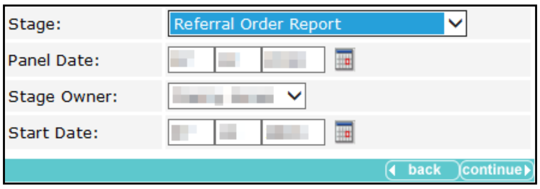
4. Select the required **Stage** from the drop-down.

   Certain stages require court appearance or panel information. If the **Stage** you selected needs additional information, an additional field is displayed:

   - If the stage needs linking to a court appearance, select the appropriate option from the **Hearing Date** field.

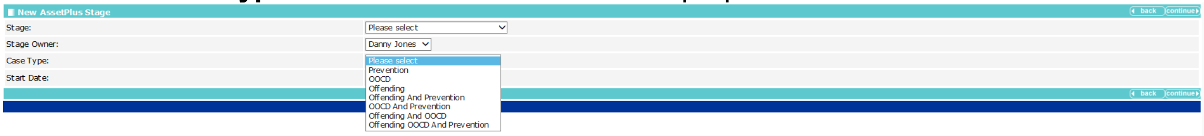


   - If the stage needs a panel date recording, enter it in the **Panel Date** field.

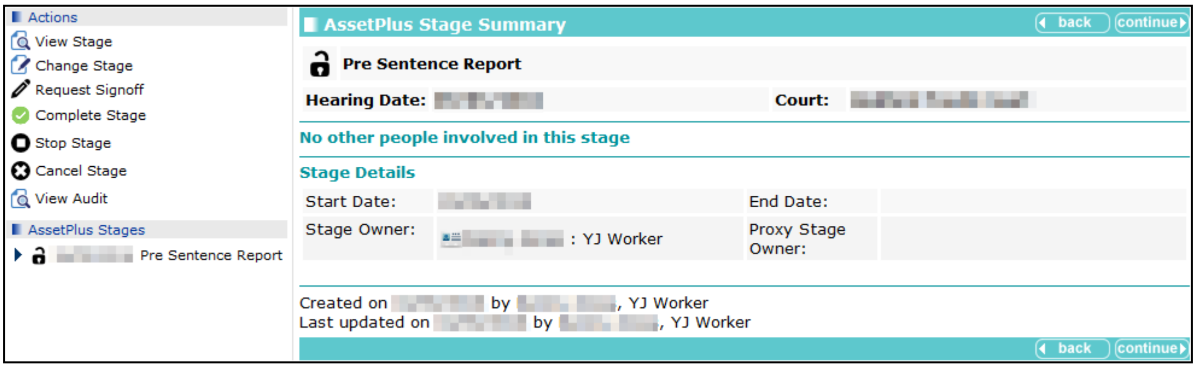


5. If required, select a new **Stage Owner**.

Select the **Case Type**. This has been introduced in preparation for case transfers.



5. If required, amend the **Start Date**.
6. Click the **continue** button to display the **AssetPlus Stage Summary** screen.

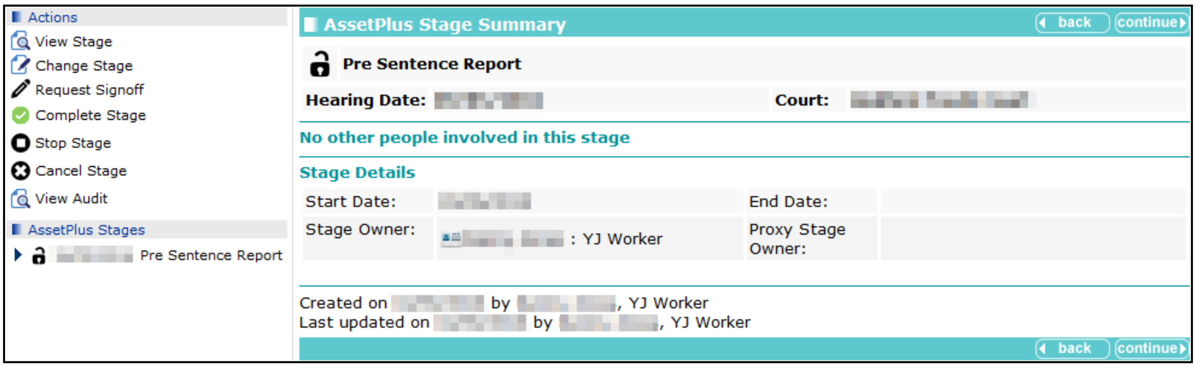


The stage is now created. To save the stage for editing at a later date, click the **continue** button to return to the client's case record. To begin editing the stage immediately, in the **Actions** menu, click the **Change Stage** hyperlink (see Editing an AssetPlus Stage on page *56*)

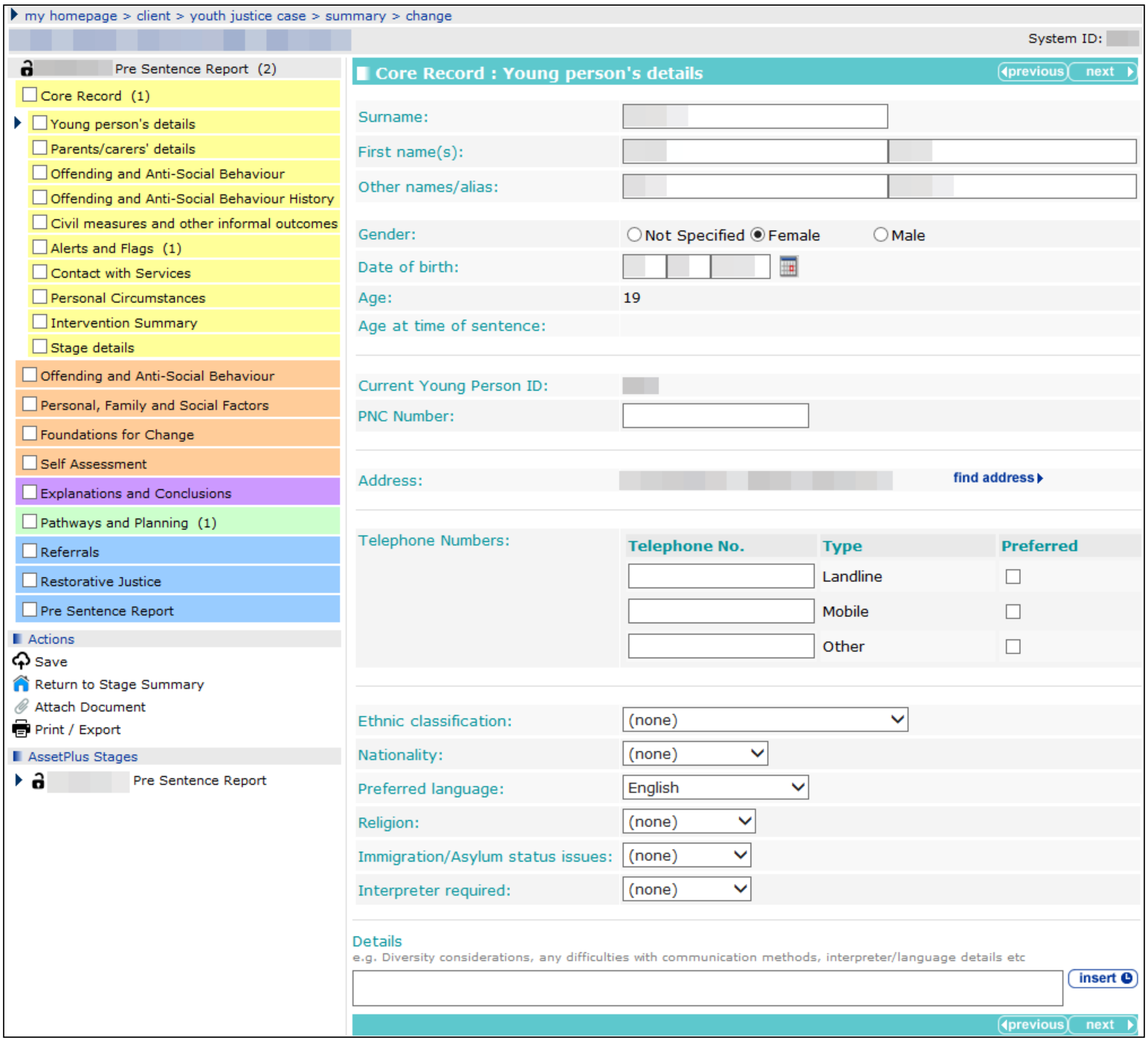
Editing an AssetPlus Stage

To edit an AssetPlus stage:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



3. In the **Actions** menu on the left-hand side, click the **Change Stage** hyperlink to display the **change** screen.



Where the information exists in the client's record or in previous stages, it is automatically pulled through into the stage. You can update existing information or enter missing information in the pages here. (See Creating a New AssetPlus Stage, step 3.c on page *55* for the exception to this.)

The coloured menus on the left-hand side are the different sections and subsections of the stage. You can navigate through the stage by clicking the required page in the menu, or by using the **previous** and **next** buttons.

4. Proceed through the stage and provide or update the information as required.
5. To save progress for completion at a further date, click the **Save** hyperlink in the **Actions** menu.

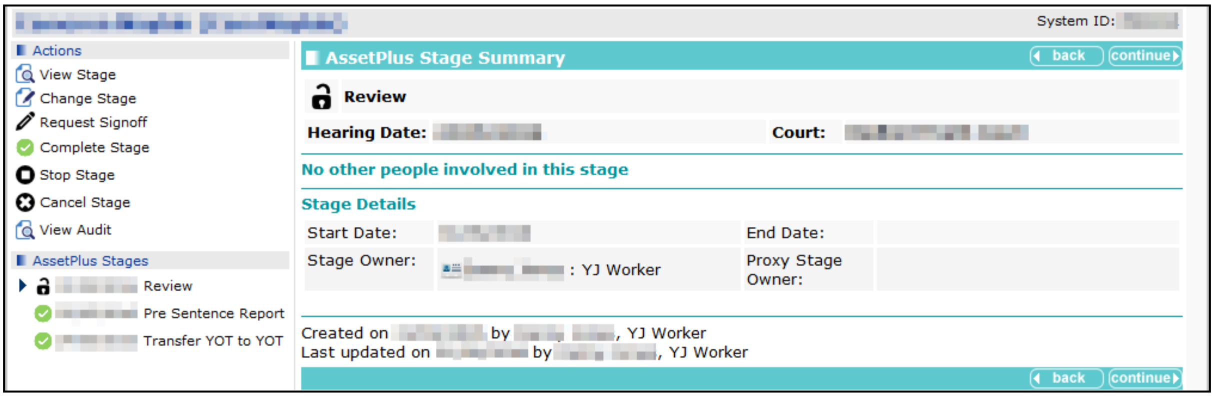
After all the required information has been entered, the stage can be signed off.

Adding People to a Stage

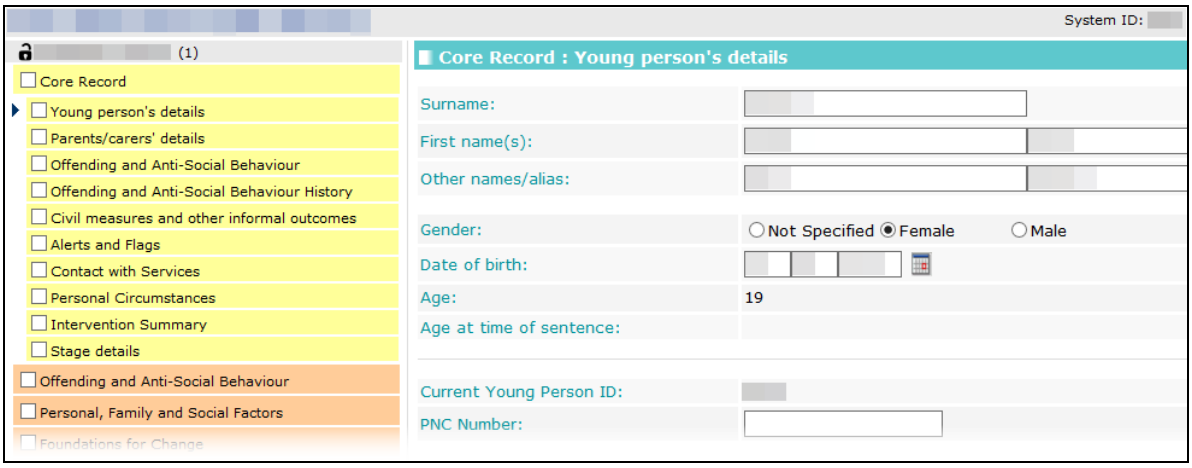
You can assign sections and subsections of the stage to other users.

1. Access the required client record. For more information, see *Accessing Client Records* on page *13*.

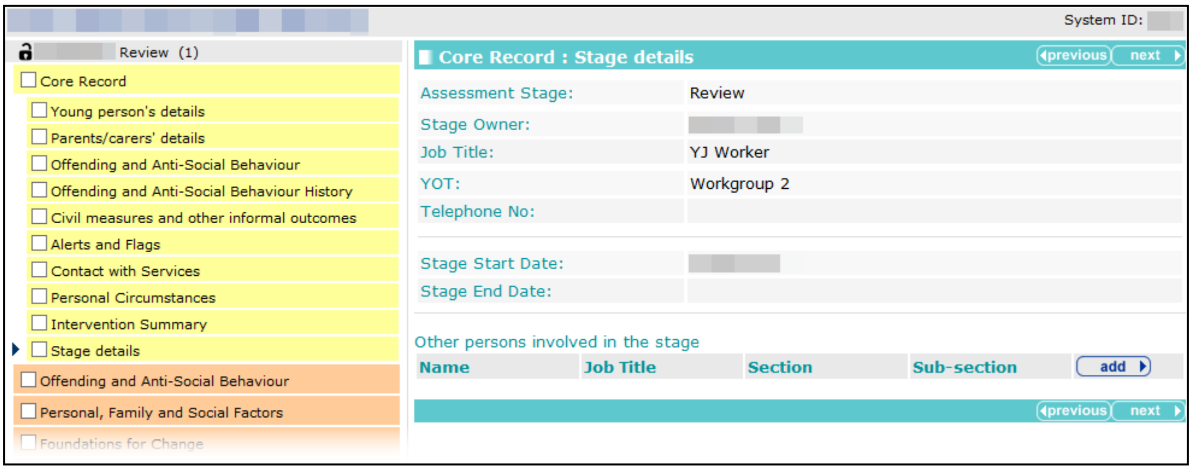
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



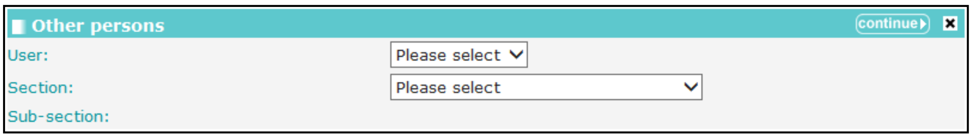
3. In the **Actions** menu on the left-hand side, click the **Change Stage** hyperlink to display the **change** screen.



4. In the **Core Record** section, select the **Stage details** subsection.

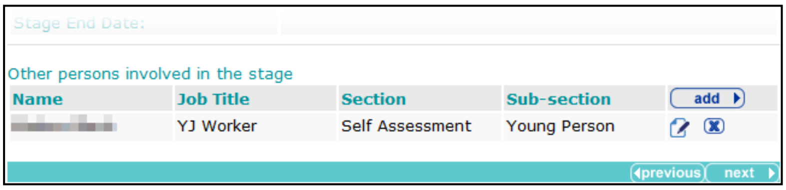


5. In the **Other persons involved in the stage** table header, click the **add** button to display the **Other Persons** dialog.



6. Select the **User** to whom the section is to be assigned.

7. Select the **Section** to assign. The **Sub-section** drop-down is displayed.
8. Select the appropriate **Sub-section**.
9. Click the **continue** button to add the user to the stage.



10. In the **Actions** menu on the left-hand side, click the **Save** hyperlink to save the changes. You can now exit the stage.

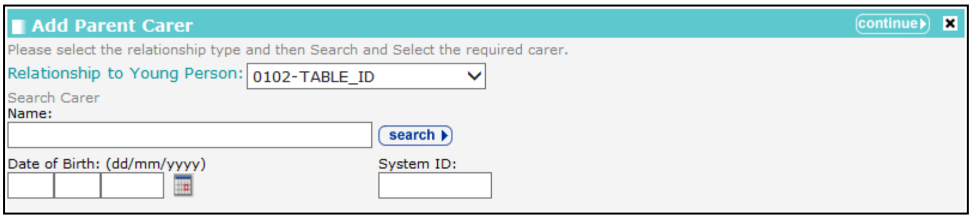
Updating Parent and Carer Details

You can link to existing parent/carer records within an AssetPlus stage. Any changes made to the record within the stage are automatically updated across the One suite. Similarly, any changes made to the record in other areas of One are reflected in AssetPlus.

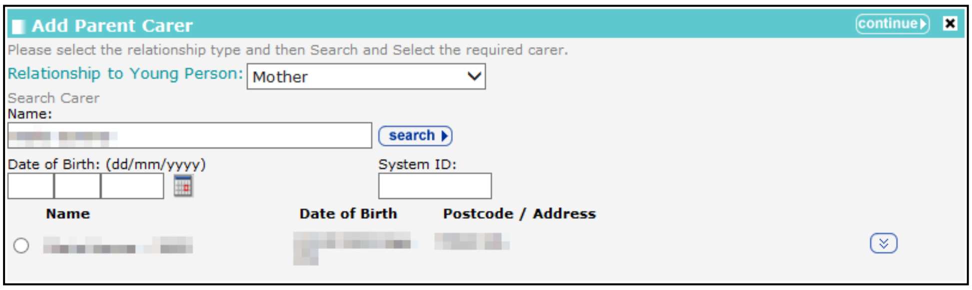
You cannot create new parent/carer records within AssetPlus. You can only link to existing ones.

To link to a parent/carer record:

1. In the **Parents/carers' details** or **Parents/Carers/Significant adults details** subsection, click the **new** button to display the **Add Parent Carer** dialog.

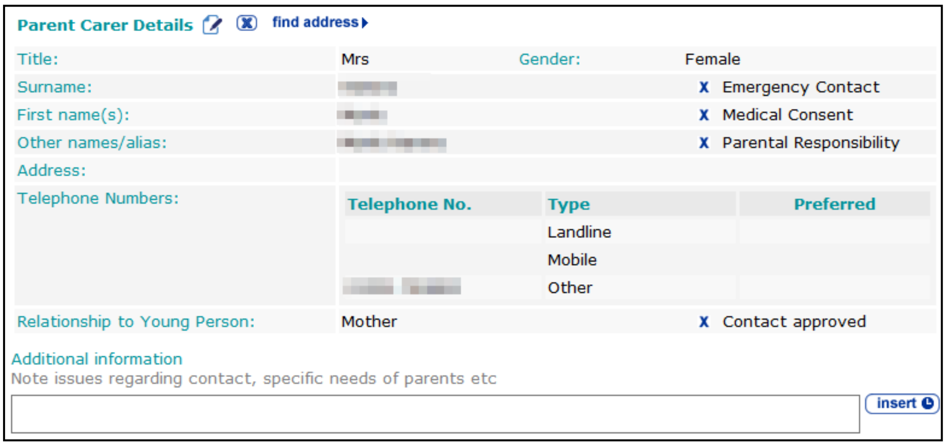


2. Select the parent or carer's **Relationship to the Young Person** from the drop-down.
3. Complete the **Name**, **Date of Birth** and **System ID** fields with as much detail as available.
4. Click the **search** button to display the results.

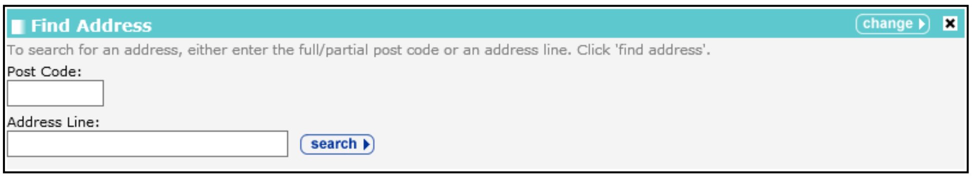


5. Select the appropriate person.

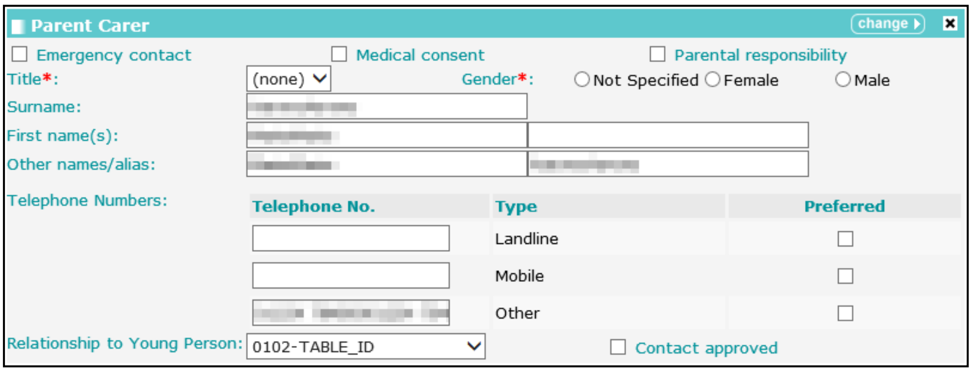
6. Click the **continue** button to add the parent or carer to the record.



7. If required, add an address:
   a. Click the **find address** hyperlink to display the **Find Address** dialog.



   b. Enter a **Post Code** or **Address Line**.
   c. Click the **search** button to display the results in the **Addresses found** list.
   d. Select the required address.
   e. Click the **change** button.
8. If required, update the information displayed:
   a. Click the edit icon to display the **Parent Carer** dialog.



   b. Update the fields as required.
   c. Click the **change** button.
9. Proceed to the next subsection using the **next** button, or save your changes by clicking the **Save** hyperlink in the **Actions** menu.

Episodes

Introduction

Episodes are groups of related offences or antisocial behaviour incidents. You should only group offenses or incidents that have similar circumstances, influences, motivations and attitudes. You cannot include offenses and antisocial behaviours in the same episode.

You can only add current offences (offences for which guilt has been admitted or established) to an episode. An offence is current if:

- It has a plea of Guilty, Found Guilty or Offence Admitted (in any court appearance), but it has no outcome.
- It has a substantive outcome, but no linked intervention programme; it has never been included in an episode within a completed AssetPlus stage.
- It has a substantive outcome and a current intervention programme (currency defined by the start and end dates).

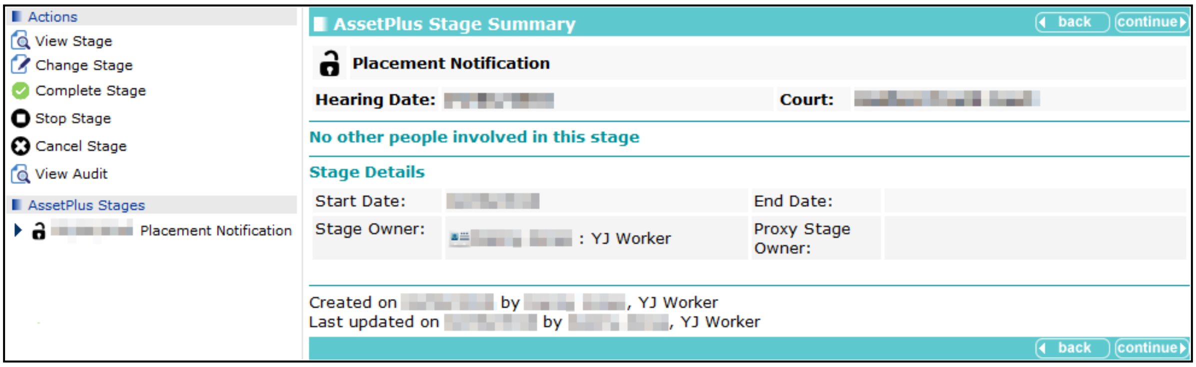
Offences that stop meeting these criteria while a stage is in progress remain current until the stage is stopped or completed.

When all interventions associated with the offences in an episode finish, the episode becomes historic and can no longer be updated.

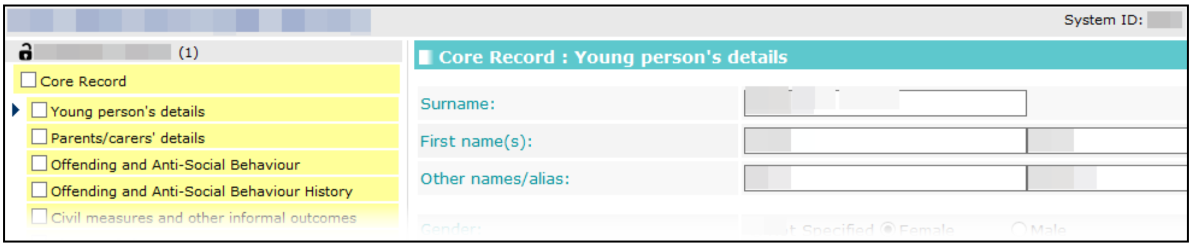
Creating an Episode

To create an episode:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



3. In the **Actions** menu on the left-hand side, click the **Change Stage** hyperlink to display the change screen.



4. Navigate to the **Offending and Anti-Social Behaviour** subsection of the core record.

5. In the **Offense(s)** or ASB **Incident(s)** table, select the offences or incidents you want to add to the episode.

Offence(s)

create episode

Episode	Offence Details	Offence Start	Offence End	Seriousness	Plea	Disposal Start	Disposal Type
☐	Violence Against The Person : Other wounding : Assault occasioning actual bodily harm (ABH) : 4	[illegible]		4		[illegible]	Community Resolution
☑	Vehicle Theft / Unauthorised Taking : Vehicle taking : Theft of motor vehicle : 4	[illegible]		4	Guilty	[illegible]	Conditional Caution with YOT Programme
☑	Vehicle Theft / Unauthorised Taking : Other/unspecified vehicle theft/taking : Other/unspecified vehicle theft/taking : 4	[illegible]		4	Guilty	[illegible]	Conditional Caution with YOT Programme

6. Click the **create episode** hyperlink to assign an episode number to all selected offences or incidents.

   Episode numbers are in the YYMMDDHHMM format.

Offence(s)

create episode add to existing episode

Episode	Offence Details	Offence Start	Offence End	Seriousness	Plea	Disposal Start	Disposal Type
☐	Violence Against The Person : Other wounding : Assault occasioning actual bodily harm (ABH) : 4	[illegible]		4		[illegible]	Community Resolution
1703211055	Vehicle Theft / Unauthorised Taking : Vehicle taking : Theft of motor vehicle : 4	[illegible]		4	Guilty	[illegible]	Conditional Caution with YOT Programme
1703211055	Vehicle Theft / Unauthorised Taking : Other/unspecified vehicle theft/taking : Other/unspecified vehicle theft/taking : 4	[illegible]		4	Guilty	[illegible]	Conditional Caution with YOT Programme

Adding to an Existing Episode

To add an offence or antisocial behaviour incident to an existing offence:

1. Navigate to the **Offending and Anti-Social Behaviour** subsection of the required AssetPlus stage.
2. In the **Offense(s)** or **ASB Incident(s)** table, select the offences or incidents you want to add to the episode.
3. Click the **add to existing episode** hyperlink to display the **Change Episode** dialog.
4. Select the appropriate episode number.

Change Episode change

○ 1703211119

5. Click the **change** button to add the offences or incidents to the episode.

Removing an Offence or Incident from an Episode

To remove an offence or incident from an episode:

1. Navigate to the **Offending and Anti-Social Behaviour** subsection of the required AssetPlus stage.

2. In the **Offense(s)** or **ASB Incident(s)** table, click the **x** icon to remove the offence or incident from the episode.

1703211055	Vehicle Theft / Unauthorised Taking : Other/unspecified vehicle theft/taking : Other/unspecified vehicle theft/taking : 4	[illegible]		4	Guilty	[illegible]	Conditional Caution with YOT Programme

Attaching Documents

Introduction

Documents can be attached to the following AssetPlus stage sections and specific subsections:

Section or Module	Subsection
Core Record	**Civil measures and other informal outcomes** **Alerts and Flags** **Contact with Services**
Offending and Anti-Social Behaviour (or Anti-Social Behaviour if Prevention only)	**Offending and Anti-Social Behaviour (or Anti-Social Behaviour if Prevention only)** **Patterns and Attitudes** **Other Behaviours of particular concern**
Personal, Family and Social Factors	**Living Arrangements and Environmental factors** **Parenting Family and Relationships** **Young Person's Development** **Learning, Education, Training and Employment**
Foundations for Change	**Resilience and goals** **Opportunities** **Engagement and Participation** **Factors affecting Desistance**
Self Assessment	**Young Person** **Parent**
Explanations and Conclusions	**Understanding Offending Behaviour (Behaviour if Prevention only)** **Future Behaviour** **Safety and Wellbeing**
Pathways and Planning	**Intervention Indicators** **Key areas of Intervention** **Resources and Proposals** **Tailoring Interventions** **Overall Progress** **Our Intervention Plan** **Additional Information** **Temporary Release** **Dealing with changing circumstances**

Section or Module	Subsection
Bail and Remand	
Custody	
Leaving Custody	**Notice of Supervision / Licence** **Release arrangements**
Referrals	
Restorative Justice	**Key areas of Intervention** **Offending and Anti-Social Behaviour (or Anti-Social Behaviour if Prevention only)** **Young Persons views** **Tailoring Interventions**
Pre Sentence Report	**Offence Analysis** **Assessment of the young person** **Assessment of the need for parenting support** **Assessment of the risk to the community** **Conclusion and proposal for sentencing** **Assessment of Dangerousness**
Referral Order Panel Report	**Offence Analysis** **Assessment of the young person** **Assessment of the risk to the community** **Introduction** **Elements of contract and progress** **Conclusion**
YOT to Adult Services	
YOT to YOT Transfer	

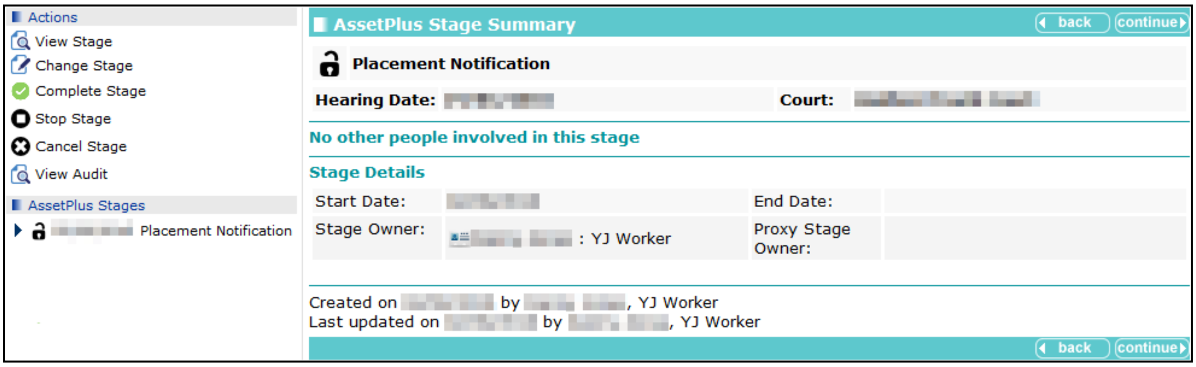
Attaching Documents to a Stage

NOTE: *Attached documents are only displayed within the appropriate subsections of the current stage, i.e. the subsection to which it was uploaded, or all subsections of the section to which it was uploaded. Documents do not get copied to subsequent stages or displayed in the* ***Documents, Notes, Forms & Requests*** *panel in the client's Youth Justice case record.*

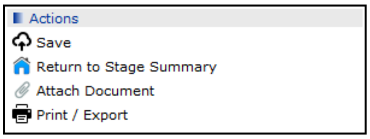
To attach a document to a stage section or subsection:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.

2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.

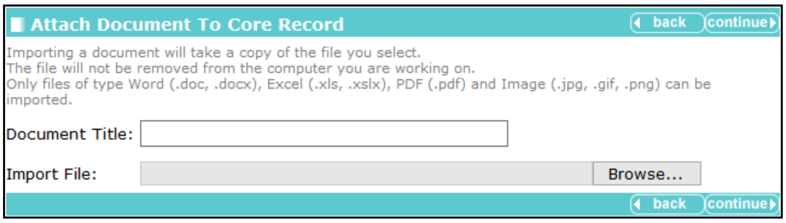


3. In the **Actions** menu on the left-hand side, click the **Change Stage** hyperlink to display the **change** screen.

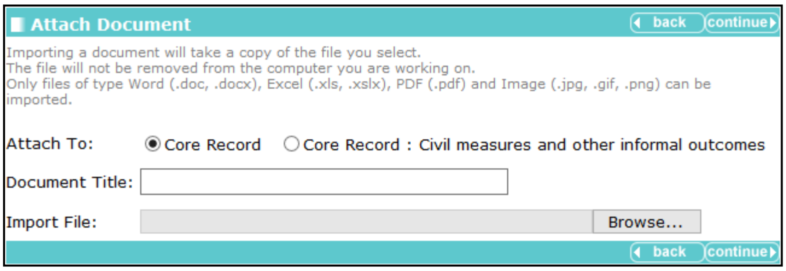


4. Navigate to the required section or subsection.
5. In the **Actions** menu on the left-hand side, click the **Attach Document** hyperlink.

   If the subsection does not permit the attaching of documents, the **Attach Document to [Section Name]** screen is displayed.

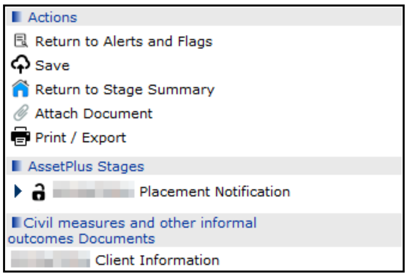


   If the subsection does permit the attaching of documents, the **Attach Documents** screen is displayed.



6. If required, select the relevant **Attach To** radio button to add the document to the section or subsection.
7. Enter a **Document Title**.
8. Click the **Browse…** button to display the **Choose File to Upload** dialog.
9. Navigate to and select the file, then click the **Open** button to close the dialog.

10. Click the **continue** button to upload the document. It is displayed in the left-hand side of the screen below the appropriate subsections.

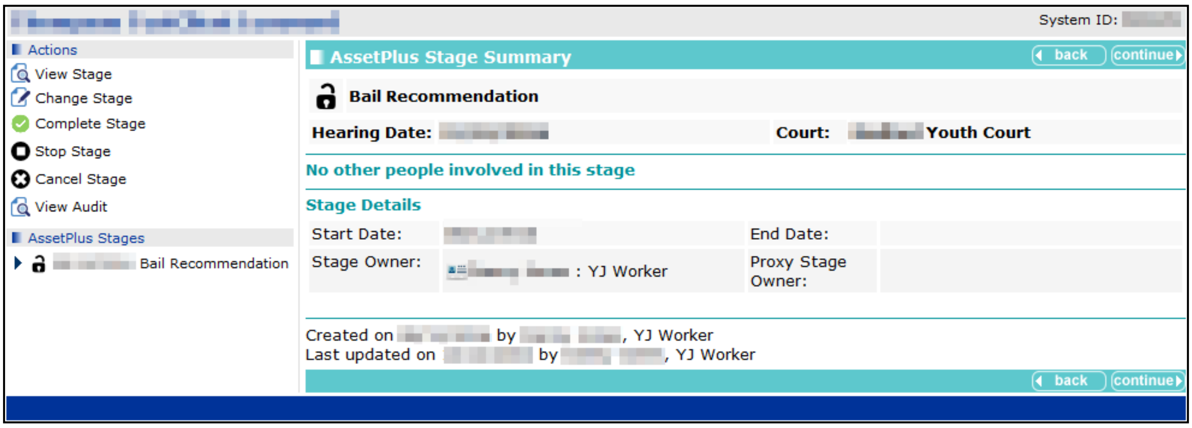


Stopping an AssetPlus Stage

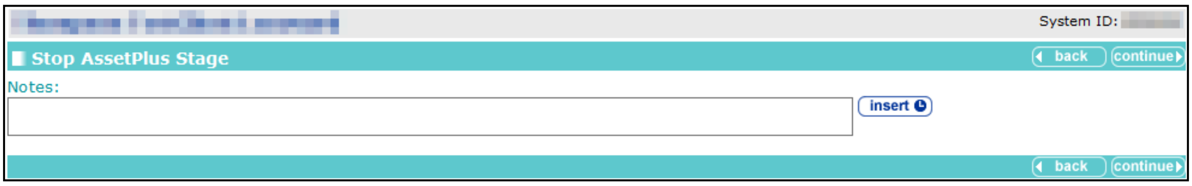
WARNING: *If you stop an AssetPlus stage, you can no longer edit it and it cannot be completed or signed off. If you need to complete it, you will need to restart it in a new stage.*

To stop a stage:

1. Access the required client record. For more information, see *Accessing Client Records* on page *13*.
2. In the **AssetPlus** panel, click the **Details** button to display the **AssetPlus Stage Summary** screen.



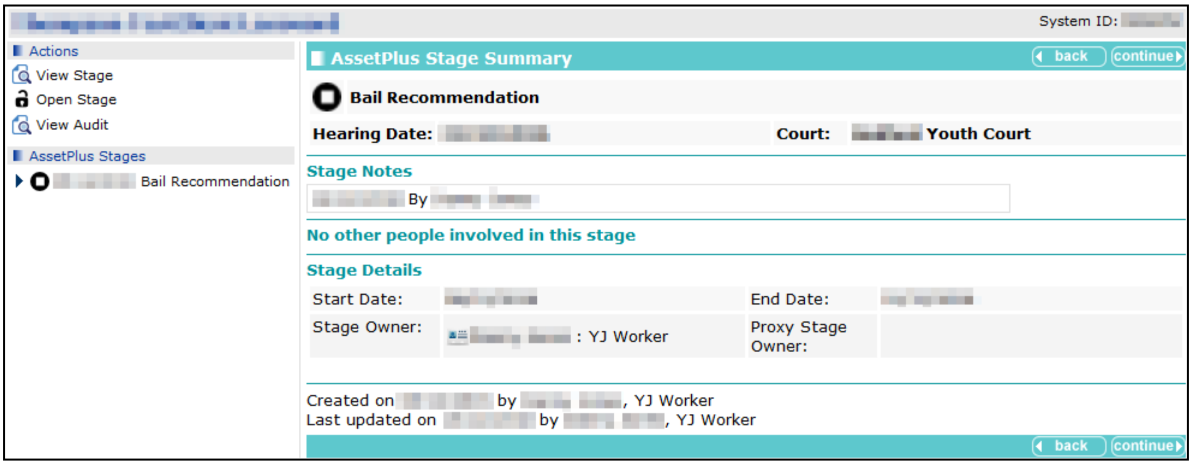
3. If the currently open stage is not displayed in the **AssetPlus Stage Summary** panel, select it from the **AssetPlus Stages** panel.
4. In the **Actions** menu on the left-hand side, click the **Stop Stage** hyperlink to display the **Stop AssetPlus** screen.



5. Provide an explanation about why the stage was stopped in the **Notes** field.

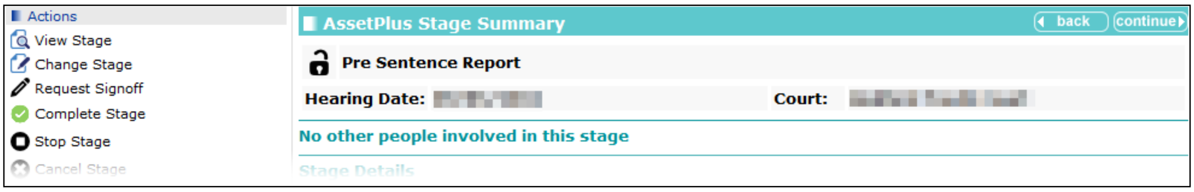
6. Click the **continue** button to return to the **AssetPlus Stage Summary** screen.

   The stage is now marked as stopped.



Requesting Signoff for an AssetPlus Stage

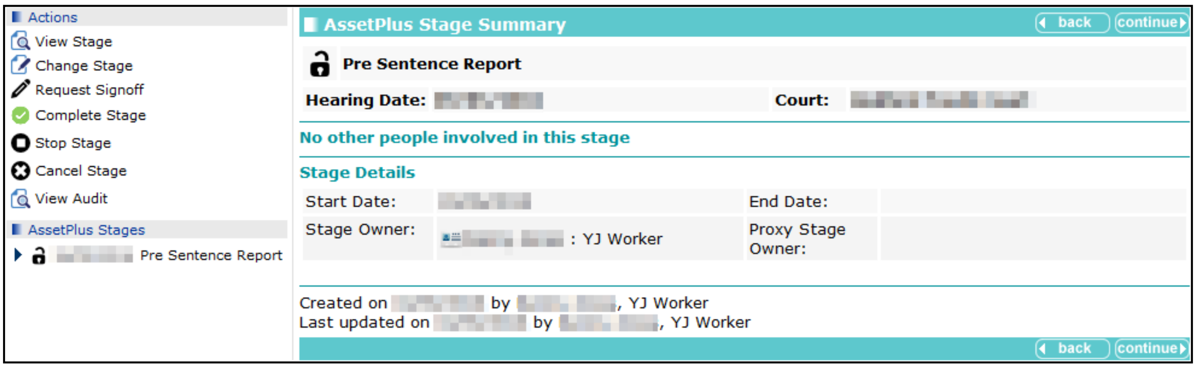
Stages may require managerial sign off. If this is the case, the **Request Signoff** hyperlink is displayed in the **Actions** menu of the **AssetPlus Stage Summary** screen.



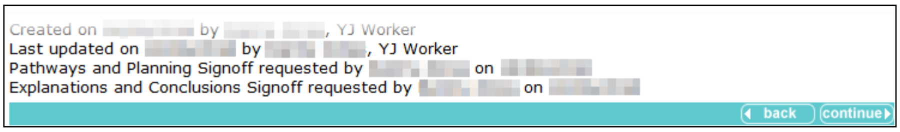
If all the mandatory and relevant information has been provided, you can request that the stage is signed off. After the signoff request has been sent, your manager is notified by internal messaging and can then sign off the stage.

To request signoff for a stage:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



3. In the **Actions** menu, click the **Request Signoff** hyperlink to display a confirmation dialog.
4. Click the **OK** button to confirm the signoff request. The **AssetPlus Stage Summary** panel is updated with the signoff request information.

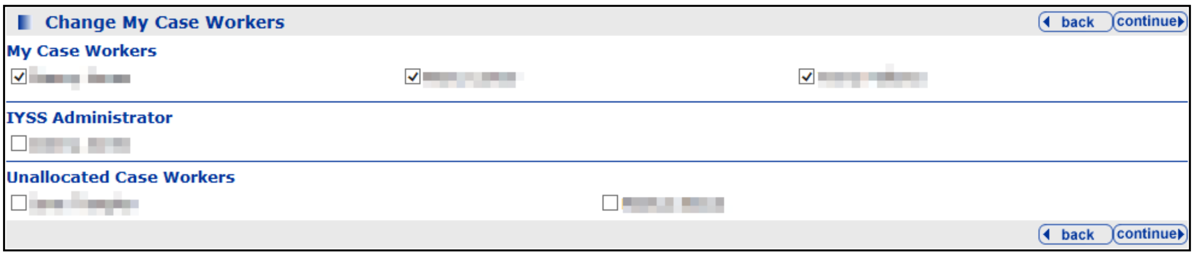


Assigning Workers

For users to be able to request stages to be signed off, they must be allocated to a manager. Managers should allocate to themselves all users for whom they are responsible. This is done in the IYSS web application. Users can have more than one allocated manager.

To allocate workers to yourself:

1. In the **IYSS Links** panel in **my homepage**, click the **Assign Workers** hyperlink to display the **Change My Case Workers** screen.

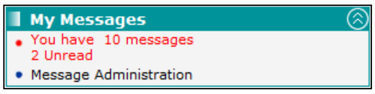


   Users are displayed beneath their assigned managers or, if they have not been assigned to a manager, in the **Unallocated Case Workers** section.

2. To allocate other workers to yourself, select the check box next to their names.
3. Click the **continue** button to save the changes and return to **my homepage**. The **Change My Case Workers** screen is automatically updated to list the new workers under your name.

Signing Off an AssetPlus Stage

If you are authorised to complete signoff requests, they are received in your IYSS message inbox. An alert is displayed in the **My Messages** panel in my homepage:



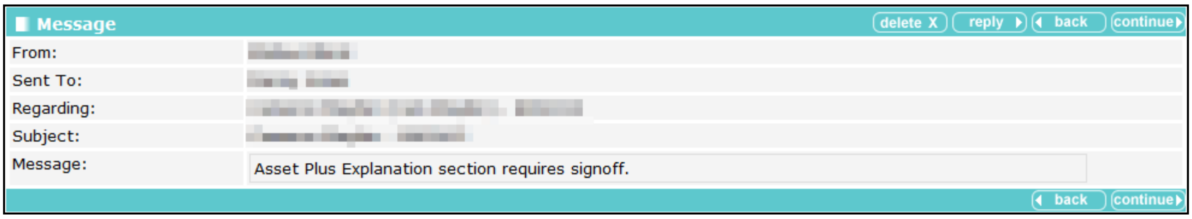
Accessing Messages

To access your messages:

1. In the **My Messages** panel, click the **You have x messages x unread** hyperlink to display the **Message Inbox** screen.

> ***NOTE:** There are two stage sections that require signoff, **Explanation** and **Pathways and Planning**, meaning that you receive two messages for each signoff request.*

2. Click the name in the **From** or **Subject** column to display the **Message** screen.

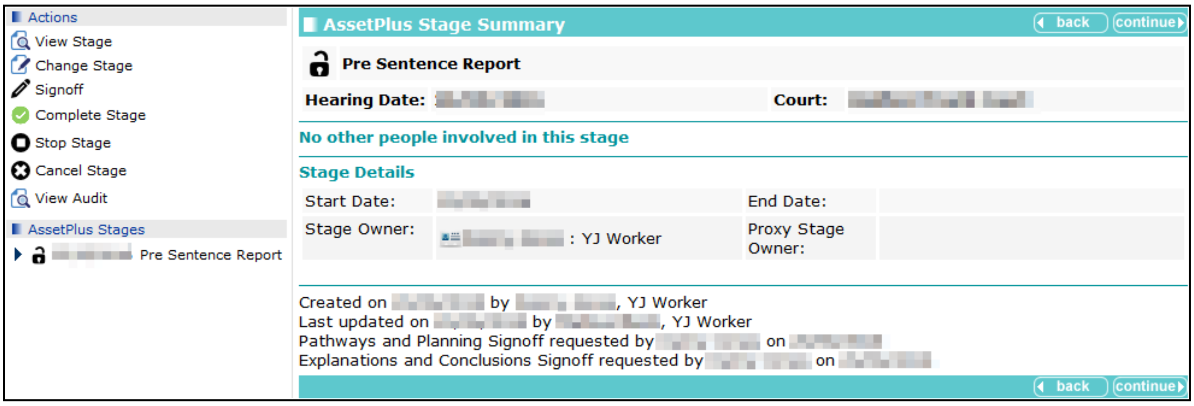


The name of the client whose stage needs signing off is displayed in the **Regarding** and **Subject** fields. After you have identified the client, you can sign off the stage.

Signing Off the Stage

To sign off a stage:

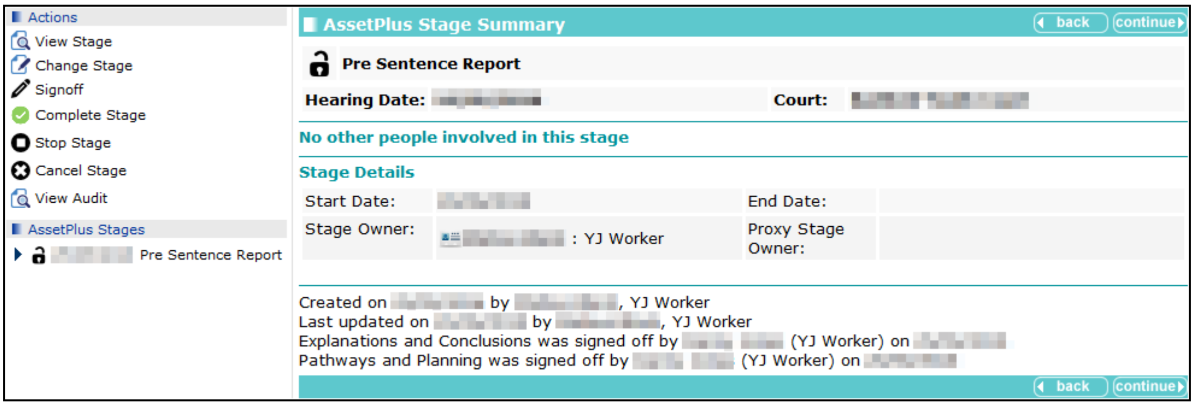
1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen. The **Request Signoff** hyperlink is replaced by the **Signoff** hyperlink.



3. Click the **Signoff** hyperlink to display the **Signoff AssetPlus Section** screen.

4. Select the **Signoff Explanations Section** and **Signoff Pathways and Planning Section** check boxes.

5. Click the **continue** button to complete the signoff and return to the **AssetPlus Stage Summary** screen, which now displays the signoff information.



NOTE: *If changes are made to signed off sections of the stage before it is completed, it must be signed off again.*

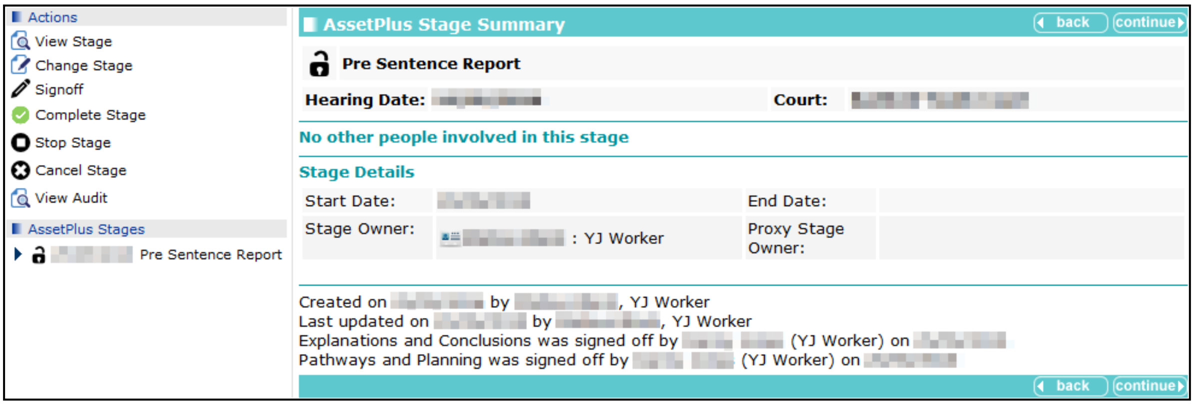
Completing an AssetPlus Stage

If all the mandatory and relevant information has been provided, and the stage has been signed off by a manager (where required), you can mark it complete.

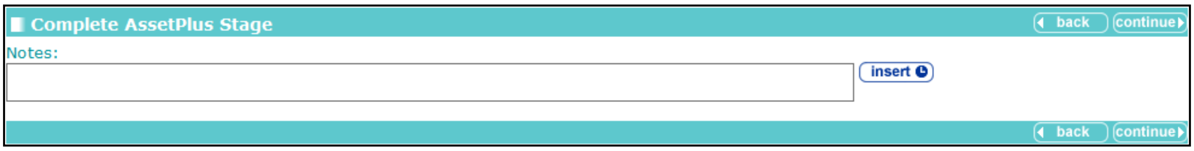
To complete a stage:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.

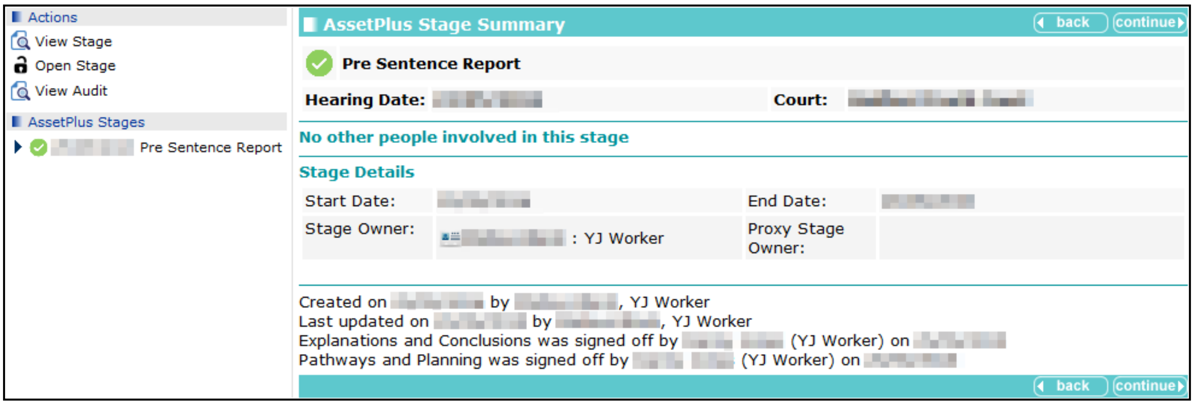
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



3. In the **Actions** menu, click the **Complete Stage** hyperlink to display the **Complete AssetPlus Stage** screen.



4. If required, add any appropriate information in the **Notes** field.
5. Click the **continue** button to mark the stage as complete and close it.

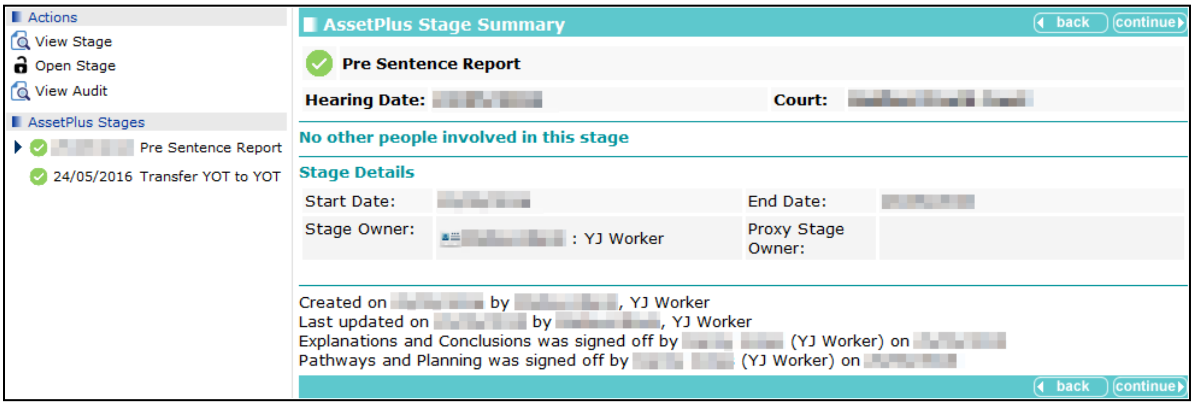


Auditing Stage History

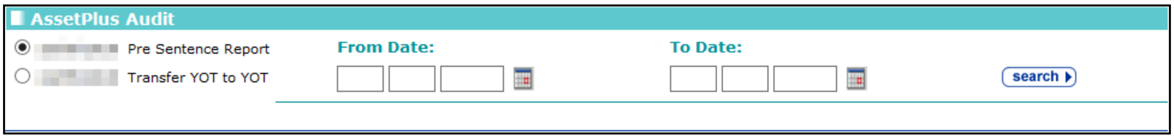
You can produce a record of all the changes made to the stage over a specified period of time using the stage audit function. The record is produced in XML format.

To run an audit of the stage update history:

1. Access the required client record. For more information, see [Accessing Client Records]() on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



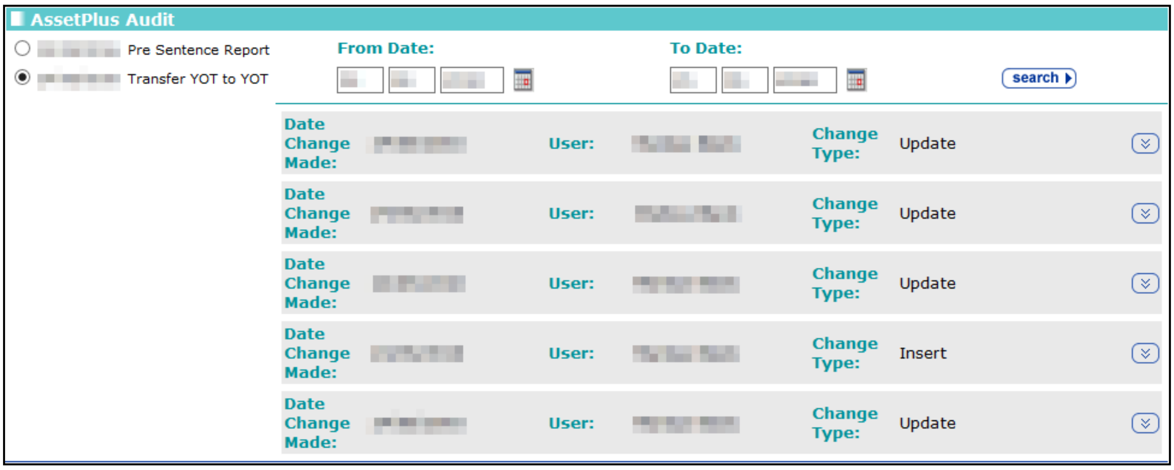
3. In the **Actions** menu, click the **View Audit** hyperlink to display the **AssetPlus Audit** screen.



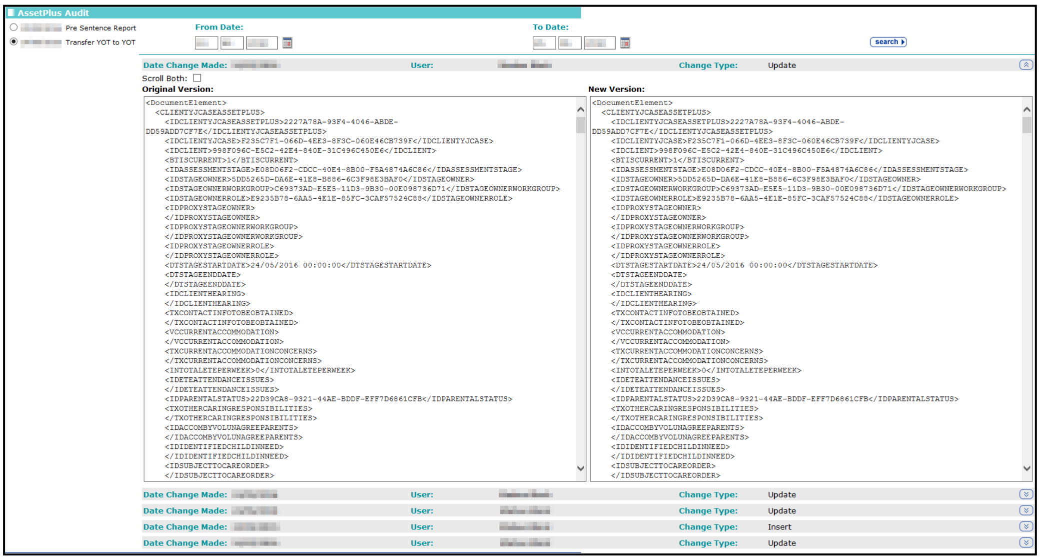
4. If there are multiple stages listed, select the radio button for the required stage.
5. Enter the **From Date** and the **To Date** in dd/mm/yyy format in the fields provided, or select the appropriate dates using the calendar icons.

***NOTE:** The **From Date** must be on or after the date the stage was created.*

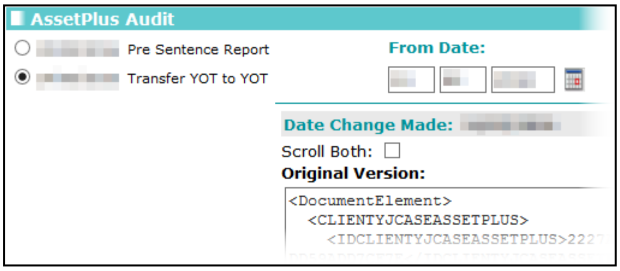
6. Click the **search** button to display the audit.



7. To display the details of a particular change, click the chevron icon to display the **Original Version** and the **Changed Version** side by side in XML format.



8. To enable simultaneous scrolling so you can compare the two versions, select the **Scroll Both** radio button.

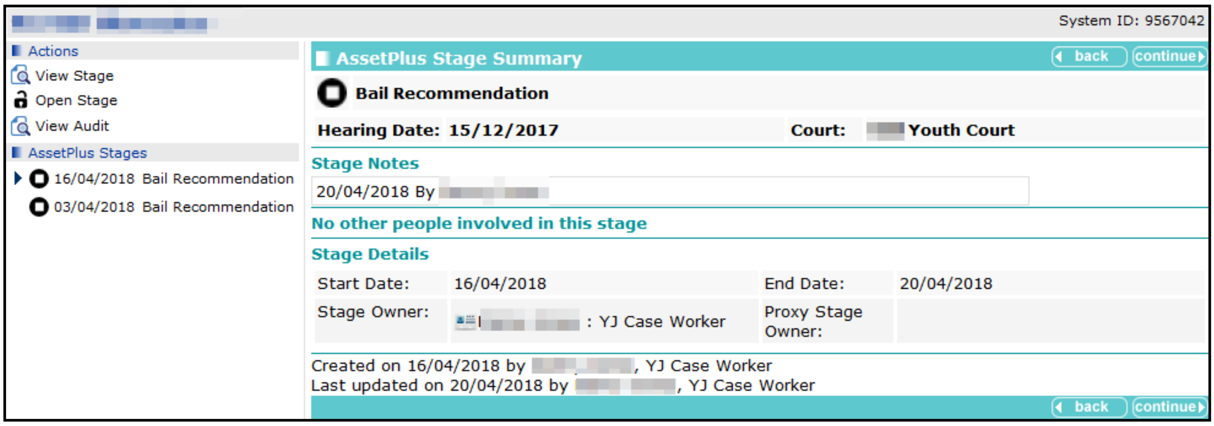


Printing and Exporting Stages

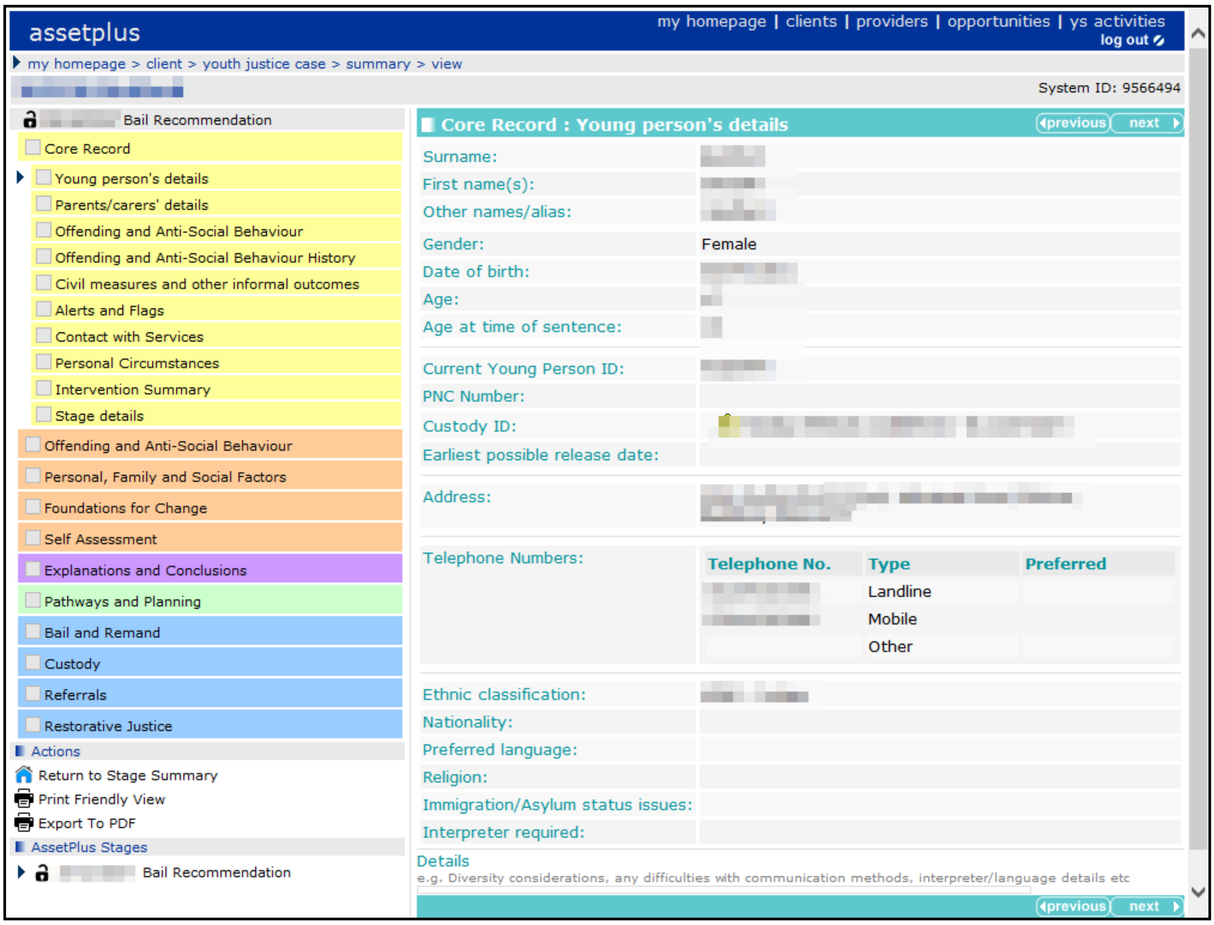
To print a section or subsection of an AssetPlus stage, you need the ‘YJ Asset Plus Section Report’ permission. If you are unable to print from an AssetPlus stage, contact your system administrator. You can create a printer friendly view of some or all the sections in a stage, or you can export the selected sections as a PDF. If you want to print a paper copy of the stage, it’s easiest to create a printer friendly version and print from within your internet browser. If you need to email the stage details, it is easier to export the sections to PDF directly.

To print or export a PDF from a stage:

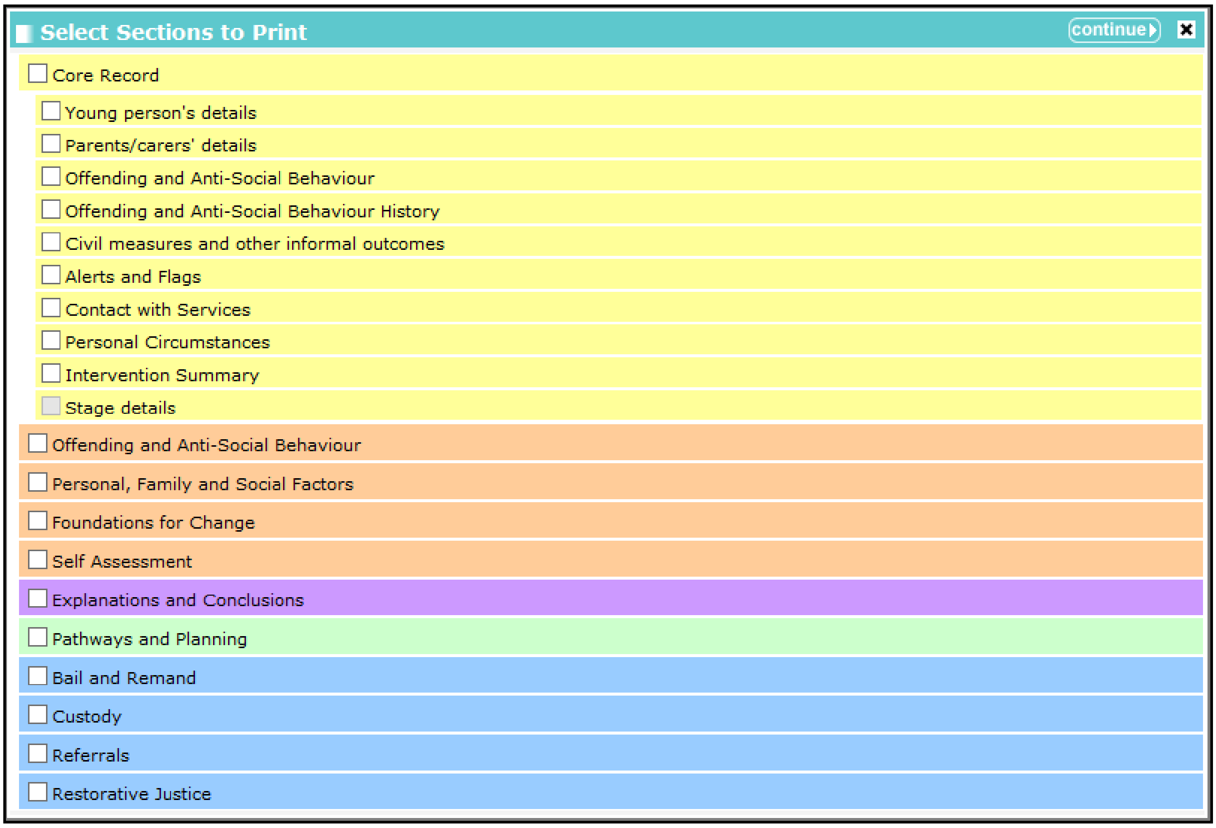
1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



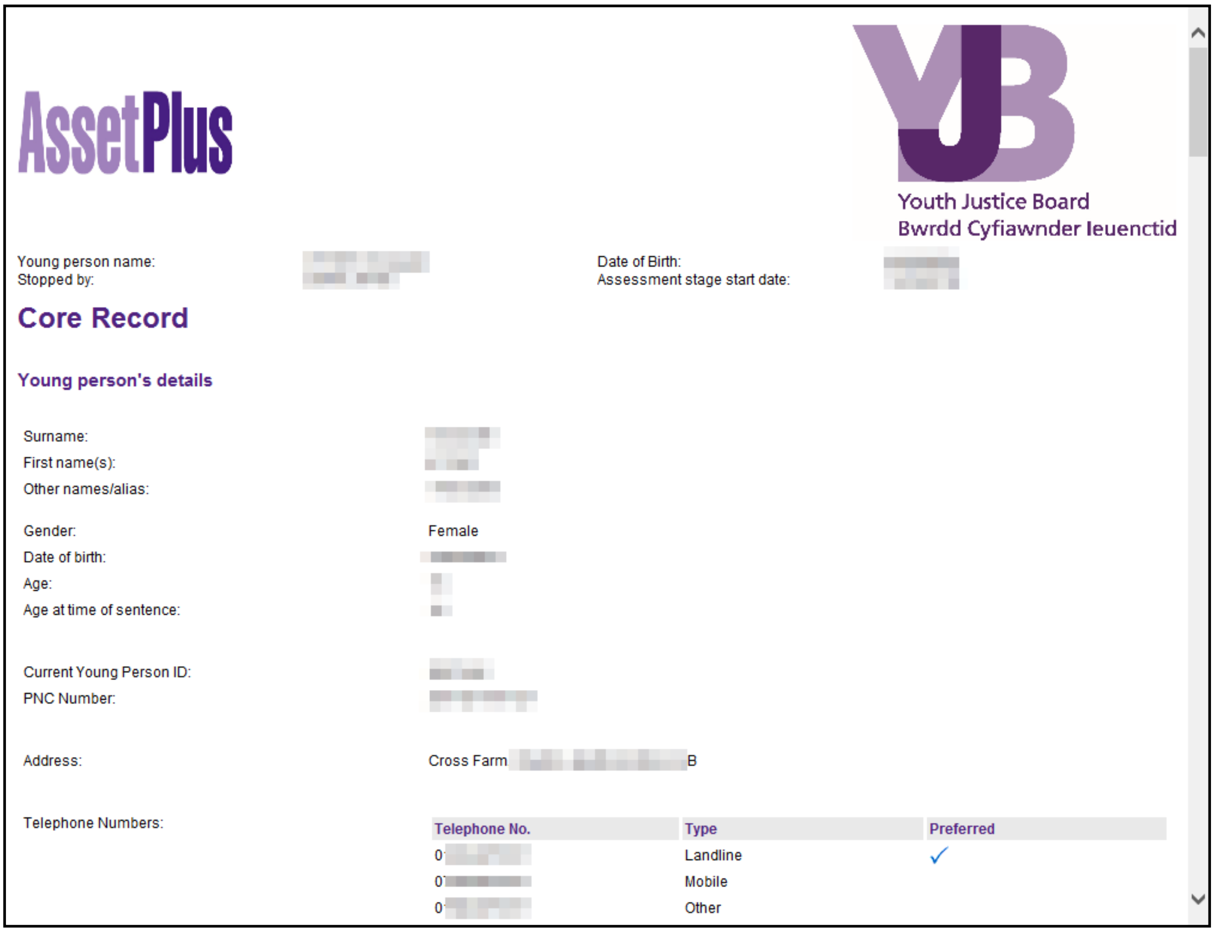
3. Click the **View Stage** hyperlink to access the stage information.



6. To create a printer friendly view of the record:
   a. Click the **Print Friendly View** hyperlink to display the **Select Sections to Print** dialog.



b. Select the sections to you want to include in the printer friendly web page.
c. Click the **continue** button to display the selected sections as a single page in a new browser tab or window.



d. If required, use the browser's print functionality to print the report.

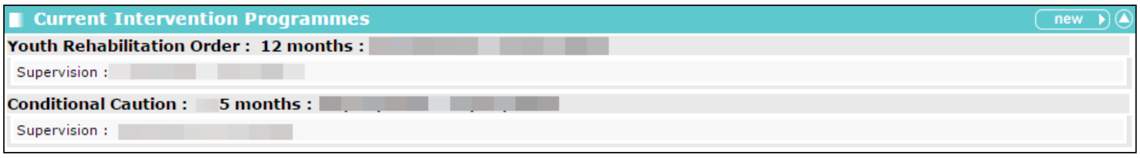
7. To create a PDF file of the record:
   a. Click the **Export to PDF** hyperlink to display the **Select Sections to Print** dialog.

b. Select the sections to you want to include in the PDF file.

c. Click the **continue** button to display the selected sections in a PDF. Depending on how your system is configured, the PDF might display in your web browser or in an external PDF viewer like Acrobat Reader.

15 | Intervention Programmes

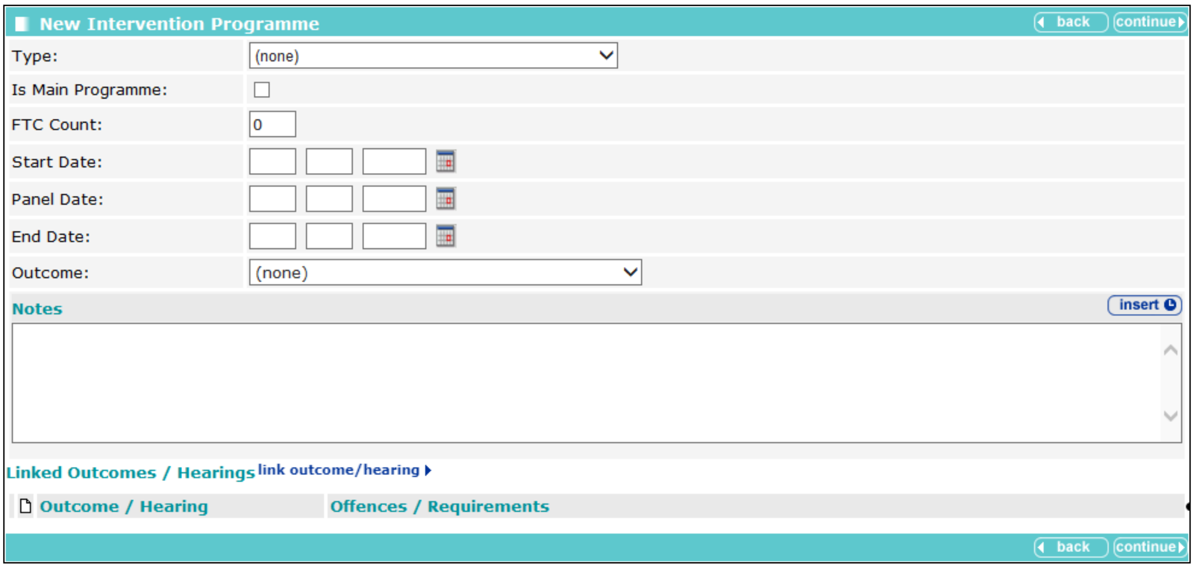
Active intervention programme records are displayed in the **Current Intervention Programmes** panel. If the client has no active interventions, the panel header is grey and reads **No Current Intervention Programmes**.



Entering a New Intervention Programme

To enter a new intervention programme:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Current Intervention Programmes** panel, click the **new** button to display the **New Intervention Programme** screen.



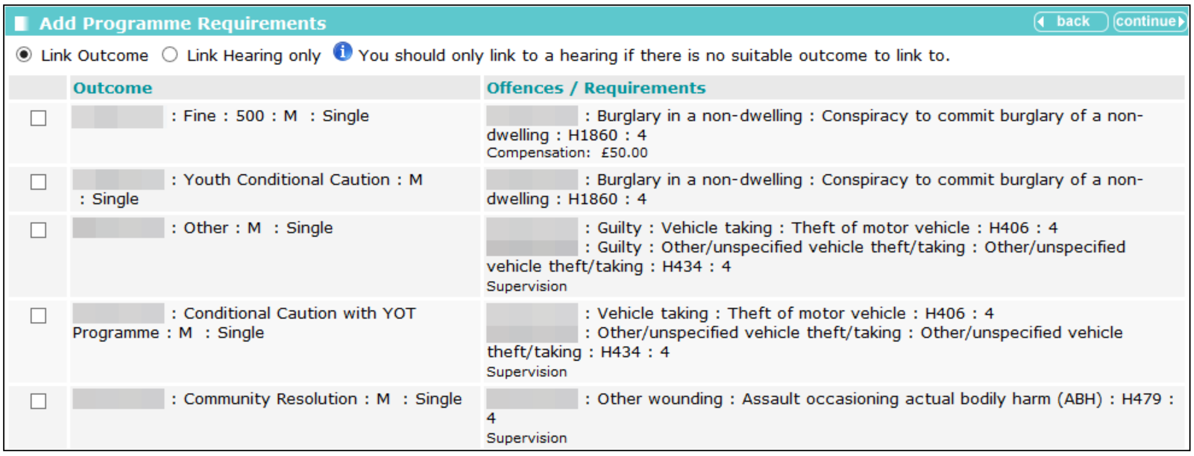
3. Select the **Type** of intervention from the menu.
4. If required, select the **Is Main Programme** check box.
5. If appropriate, enter the number of times the client has failed to comply in the **FTC Count** field.

NOTE: *You need the Override FTC Count permission to change this field.*

6. Enter or select from the calendar a **Start** and **End Date**.
7. If required enter a **Panel Date**.
8. If required, select an **Outcome** from the menu.
9. Enter any relevant **Notes**.
10. If required, link any appropriate outcomes or hearings to the programme.

    To link an outcome or hearing:

a. Click the link outcome/hearing button to display the **Add Programme Requirements** dialog.

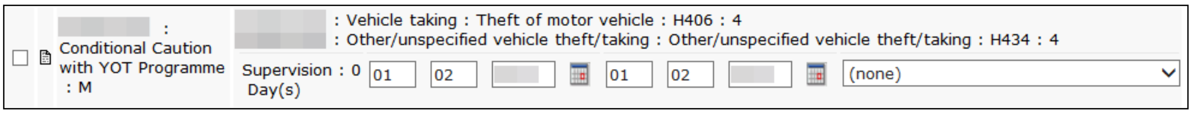


b. If there is no suitable outcome, select the **Link Hearing only** radio button to display hearings with no recorded outcome.

c. Select the appropriate outcomes or hearings.

d. Click the **continue** button to save the outcomes or hearings and return to the **New Intervention Programme** screen.

The requirements are displayed below the offences, along with the start and end dates, and the outcome, if recorded.



11. Click the **continue** button to save the intervention and return to the client record.

Updating Intervention Programmes

To update an intervention programme:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Current Intervention Programmes** panel, click the name of the required programme to display the **Change Intervention Programme** screen.
3. Update the required fields.
4. Click the **continue** button to save the event and return to the client record.

Deleting an Intervention Programme

To delete an intervention programme:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Current Intervention Programmes** panel, click the name of the required programme to display the **Change Intervention Programme** screen.

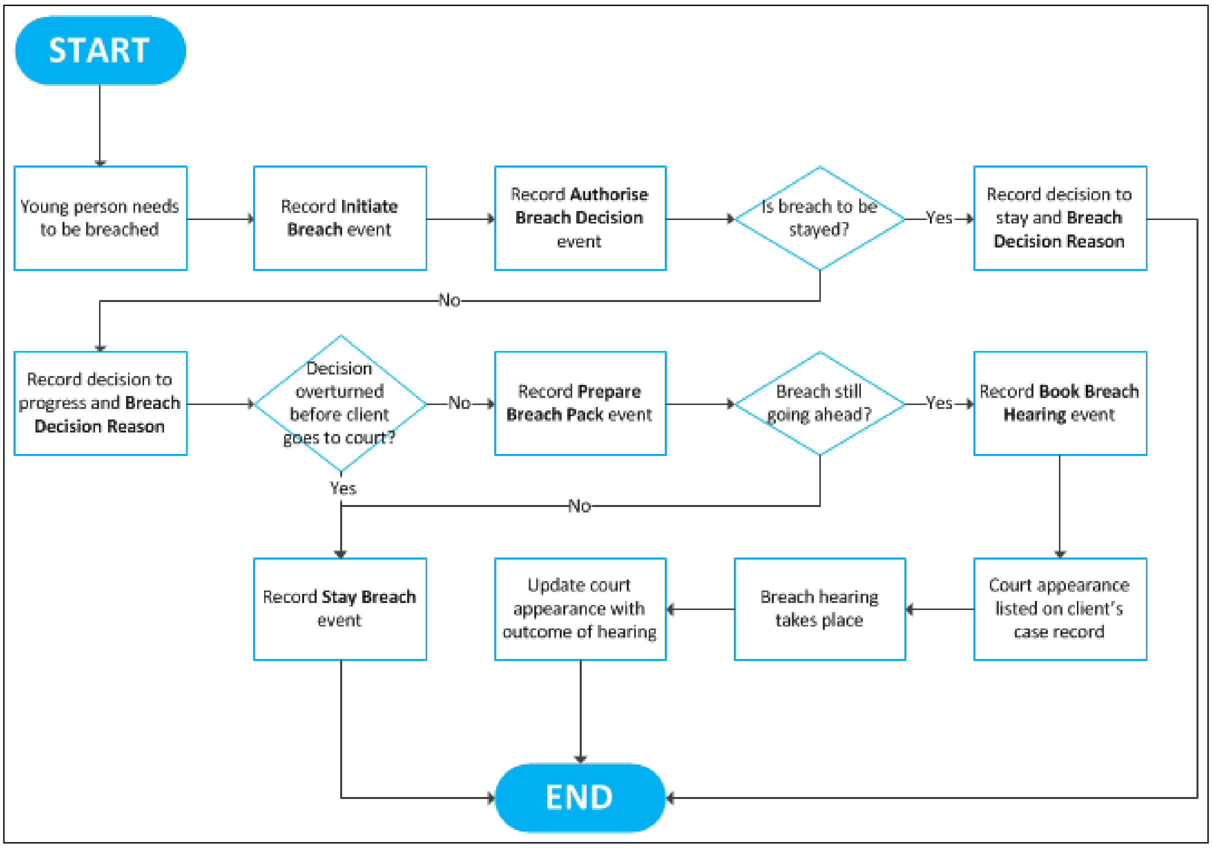
3. In the **Change Intervention Programme** panel header, click the **delete** button.
4. A warning message is displayed. Click the **OK** button to delete the intervention programme.

> ***WARNING:*** *If the intervention programme is linked to an event, deleting it removes any links it had to the event. You cannot undo this. The event is not deleted.*

16 | Managing Breaches

Breach Process Flowchart

Use the following flowchart to identify the steps you need to take to breach your client.



Creating a Breach Process Initiation

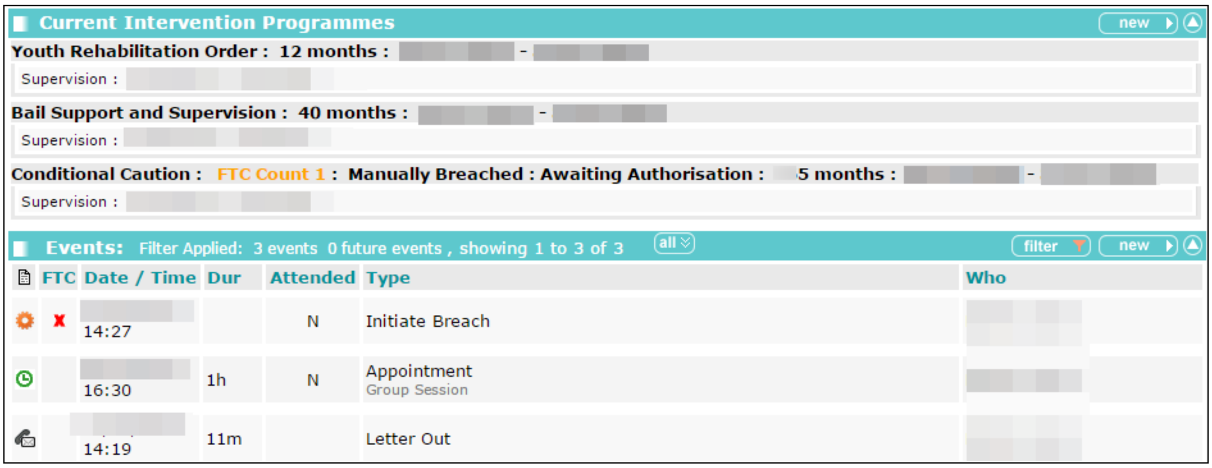
Breach process events occur in a particular order. As such, typing 'breach' into the **Event Type** field only displays the breach event types that are relevant at the current stage in the process. Further breach actions and tasks only become available for selection as each task in the process is recorded as a new event.

To initiate a breach:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. Create a new event. For more information on creating an event, see Creating a New Event on page *41*.
3. In the **Type** field, start typing 'Initiate Breach' until it is displayed as a menu option.
4. Select **Initiate Breach** from the menu.
5. Add any further information.
6. Click the **continue** button to save the breach and return to the client record.

Creating a Breach Decision Authorisation

Once the breach has been initiated an **Initiate Breach** event is displayed in the **Events** panel, and a comment is displayed next to the related intervention that the breach is awaiting authorisation. As soon as the breach is authorised, it must be entered on the client's record to confirm that it is to go ahead.

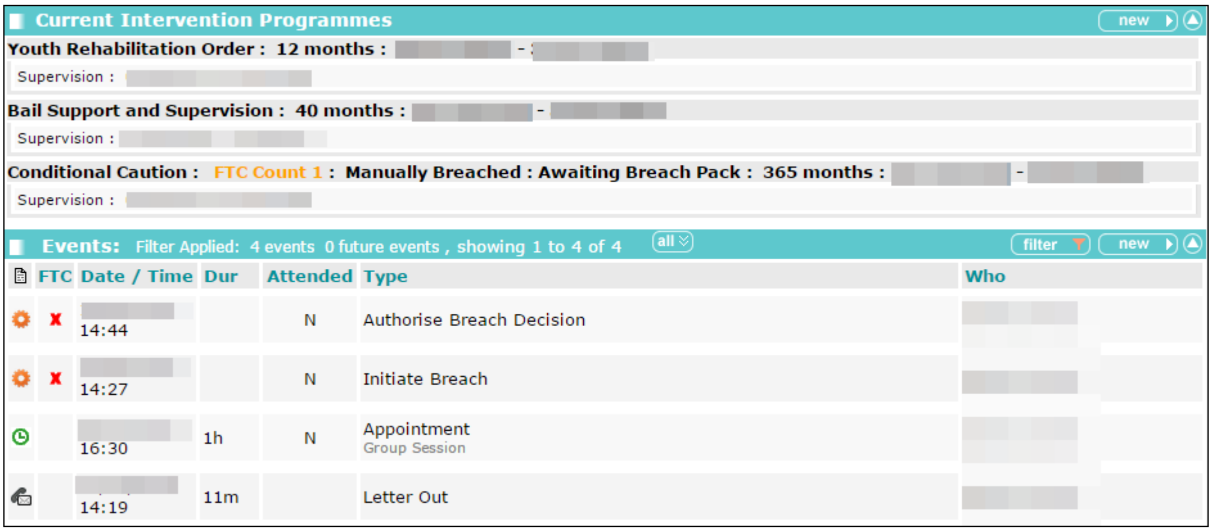


To authorise a breach:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. Create a new event. For more information on creating an event, see Creating a New Event on page *41*.
3. In the **Type** field, begin typing 'Authorise Breach Decision' until it is displayed as a menu option.
4. Select **Authorise Breach Decision** from the menu.
5. Complete the **Compliance** field.
6. Select **Breach** from the **Breach Decision** field.
7. Select the **Breach Decision Reason**.
8. If required, explain why the decision was taken to progress the breach in the **Breach Authorisation Notes** field.
9. Click **continue** to save the event and return to the client record.

Creating a Breach Pack Preparation

Once the breach has been authorised an **Authorise Breach Decision** event is displayed in the **Events** panel, and a comment is displayed next to the related intervention that the breach is awaiting breach pack. As soon as the breach pack file is ready for court, it must be entered on the client's record.

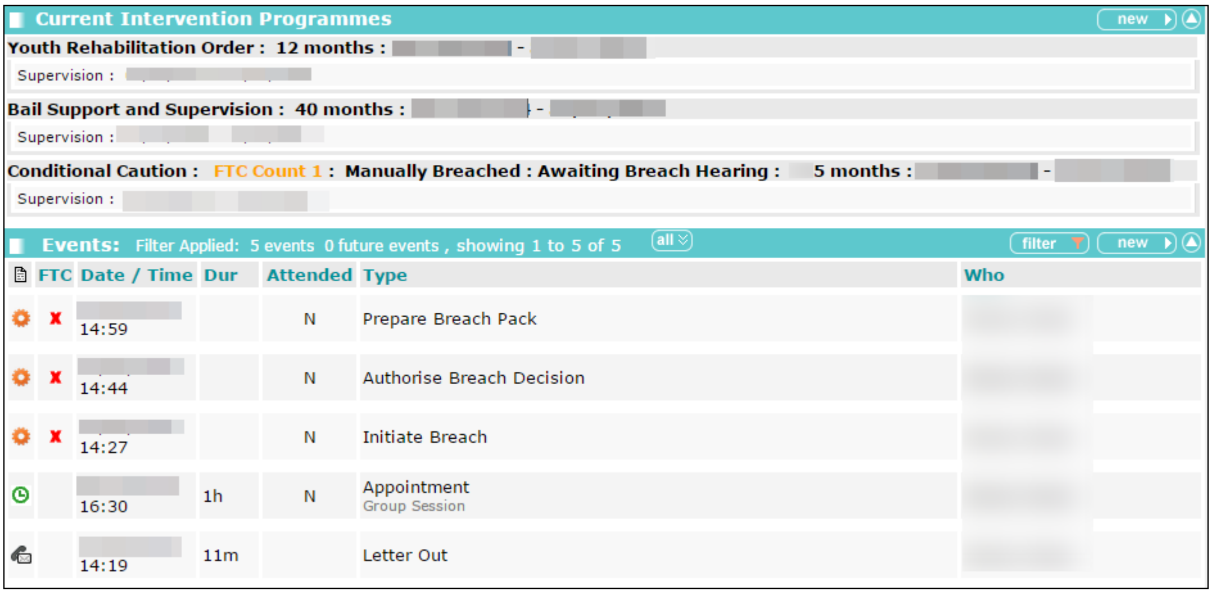


To prepare a breach pack:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. Create a new event. For more information on creating an event, see Creating a New Event on page *41*.
3. In the **Type** field, begin typing 'Prepare Breach Pack' until it is displayed as a menu option.
4. Select **Prepare Breach Pack** from the menu
5. Complete the **Compliance** field.
6. Click the **continue** button to save the event and return to the client record.

Creating a Breach Hearing

Once the breach pack has been prepared, a **Prepare Breach Pack** event is displayed in the **Events** panel, and a comment is displayed next to the related intervention that it is awaiting the breach hearing. As soon as the breach hearing date is known, it must be entered on the client's record.



To create a breach hearing record:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. Create a new event. For more information on creating an event, see [Creating a New Event](#) on page *41*.
3. In the **Type** field, begin typing 'Book Breach Hearing' until it is displayed as a menu option.
4. Select **Book Breach Hearing** from the menu.
5. Complete the **Compliance** field.
6. Enter the hearing date in the **Date** field.
7. Click the **continue** button to save the event and return to the client record.

Updating a Breach Hearing

Once the breach hearing has been listed, a court appearance is created in the **Court Appearances** panel. This is linked to the original breach offence. After the breach hearing has taken place, you need to update the court appearance record and the original offence record.

For more information on updating court appearances, see [Editing Court Appearances](#) on page *51*.

For more information on updating offence records, see [Updating an Existing Offence](#) on page *33*.

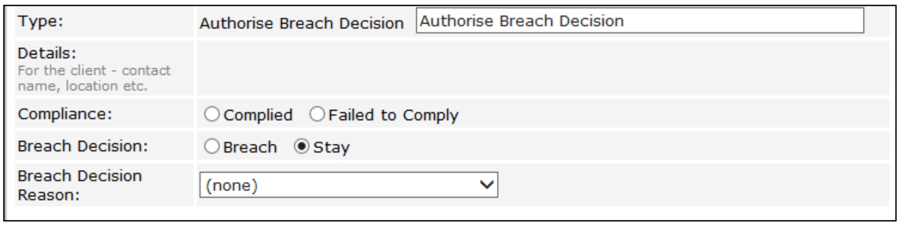
> ***NOTE:** A **Breach of Order or Licence Conditions** offence can be recorded at any point in the process, within the **Offences** panel on the young person's case record. For more information on creating offences, see [Entering a New Offence](#) on page 32.*

Staying a Breach

Stayed breaches are recorded, but not processed. The way in which a breach is stayed depends on the point in the process in which it occurs. Stays can only be recorded until a **Book Breach Hearing** event is created.

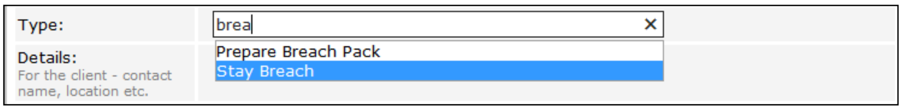
To confirm that the breach is to be stayed:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. Create a new event. For more information on creating events, see Creating a New Event on page *41.*
3. Begin entering the word 'Breach' into the **Type** menu to display the available breach options.
4. If **Authorise Breach Decision** is displayed in the menu:



   a. Select **Authorise Breach Decision** from the menu.
   b. Select the **Stay Breach** radio button.
   c. If required, select any related **Open Pre Court Decisions**.

5. If **Stay Breach** is displayed in the menu:

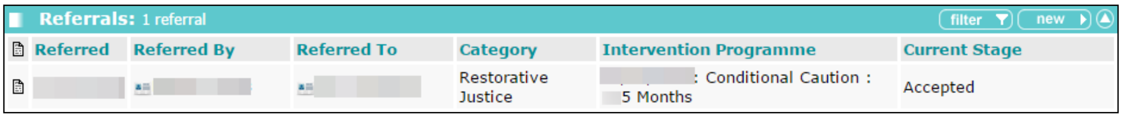


   a. Select **Stay Breach** from the menu.
   b. If required, select any related **Open Pre Court Decisions**.
   c. Enter any information about why the breach is being stayed in the **Stay Breach Notes** field.

6. If required, amend the **Date** and **Start** fields.
7. If required, select a **YJ Worker** from the menu.
8. Select the appropriate **Compliance** radio button.
9. Enter any other information in the relevant fields.
10. Click the **continue** button to save the event and return to the client record.

17 | New Referrals

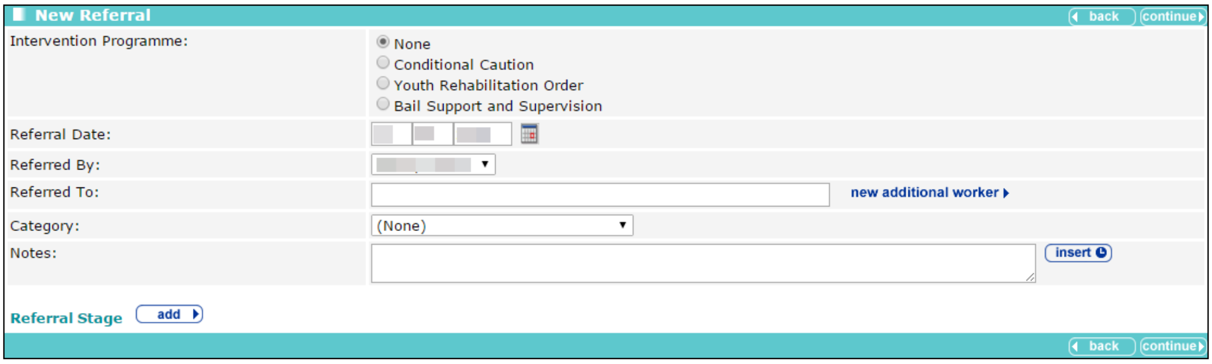
If you refer a client to a third party, you must enter this in the **Referrals** panel even if the referral is immediately or subsequently declined by the third party. If a client has no previous referrals, the panel header is grey and reads **No Referrals**.



Creating a New Referral

To create a new referral:

1. Access the required client record. For more information, see [Accessing Client Records]() on page *13*.
2. In the **Referrals** panel, click the **new** button to display the **New Referral** screen.



3. Select the **Intervention Programme**.
4. If required, amend the **Referral Date** and **Referred By** fields.
5. If the person to whom your client has been referred is known on Youth Justice, enter their name in the **Referred To** field and select the appropriate person from the menu.
6. If the person to whom your client has been referred is not already known on Youth Justice, click the **new additional worker** button to enter their details manually. For more information on adding new workers, see step 4 of [Allocating Workers]() on page *30*.
7. Select the referral reason from the **Category** menu.
8. If required, add any further information in the **Notes** field.
9. To record the third party response:
   a. Click the **add** button to display the **Referral Stage** dialog.

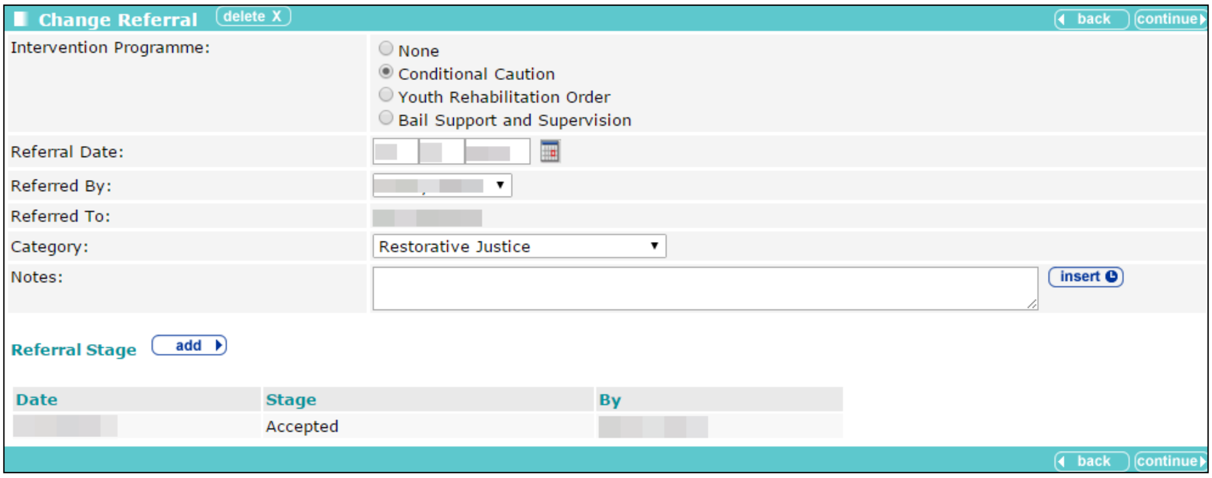
   b. If required, amend the date.
   c. Select the response from the **Stage** menu.
   d. Click the **continue** button to save the response and return to the **New Referral** screen.

10. Click **continue** to save the referral and return to the client record.

Updating a Referral

To update a referral:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Referrals** panel, click the relevant date in the **Referred** column to display the **Change Referral** screen.



3. Click the **add** button to display the **Referral Stage** dialog.

4. If required, amend the date.
5. Select the appropriate referral stage from the **Stage** menu.
6. Click the **continue** button to save the stage and return to the **Change Referral** screen.
7. If required, add any additional information in the **Notes** field.
8. Click the **continue** button to save the referral and return to the client record.

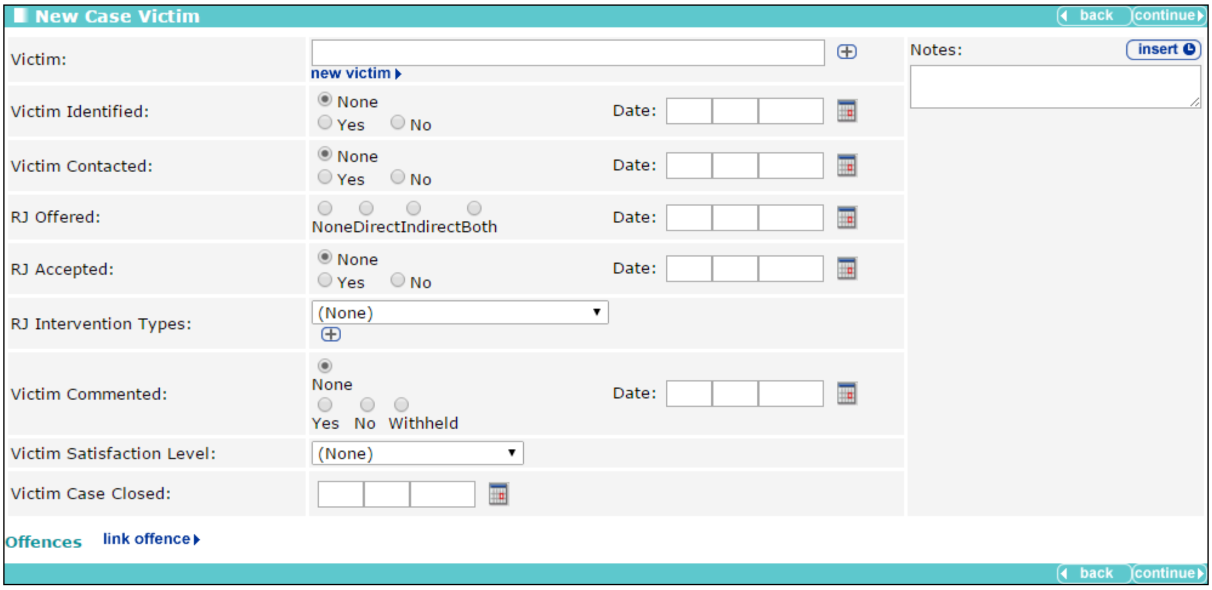
18 | Recording Victims

For client offences where a victim was involved, you must link the victim to the relevant offence. The victim must be in the Youth Justice system in order to be linked to an offence. The **Victim** record must be updated as reparations processes progress. Victims are displayed in the **Victims** panel. If there are no victims on the client record, the panel header is grey and reads **No Victims**. Once a victim has been added, the panel header is turquoise and titled **Victims**.

Adding a Victim to an Offence

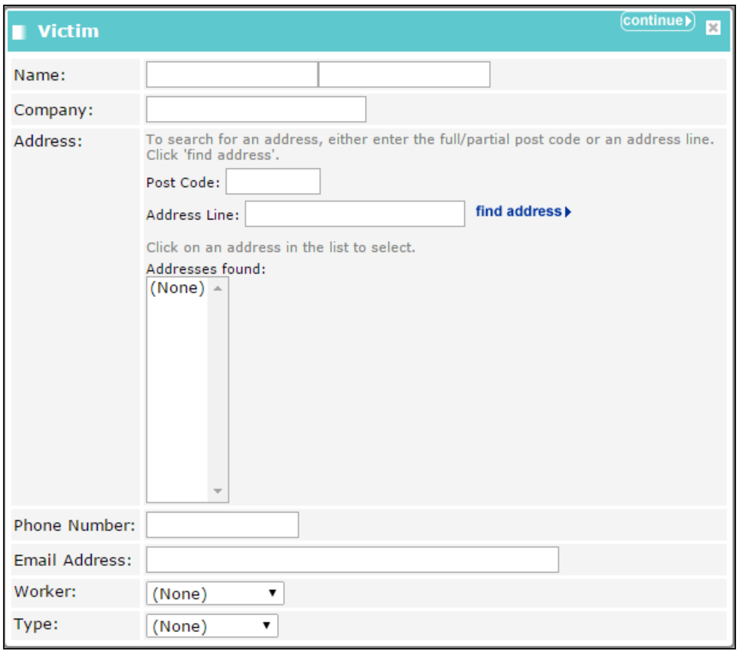
To add a victim:

1. Access the client record to which you want to add a victim. For more information, see [Accessing Client Records]() on page *13*.
2. In the **Victims** panel, click the **new** button to display the **New Case Victim** screen.



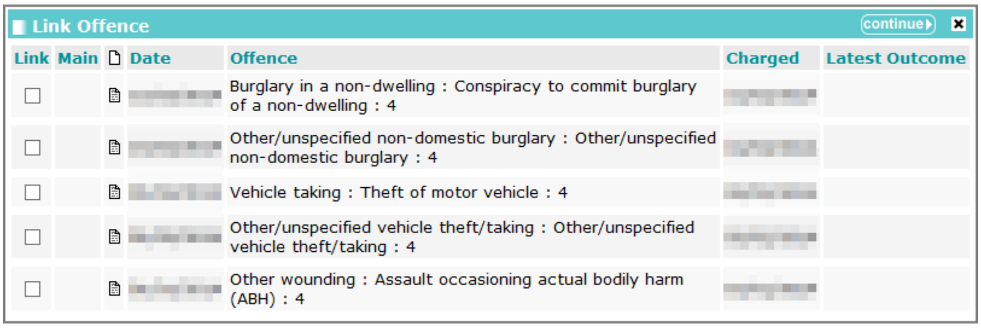
3. Start entering the victim's name into the **Victim** field. A list of victims who match the entered text and are already recorded in the Youth Justice system is displayed.

4. To add a victim not already recorded in the Youth Justice system:
   a. Click the **new victim** hyperlink to display the **Victim** dialog.



   b. Enter all known information.
   c. To enter the address:
      i. Complete the **Post Code**.
      ii. Enter the house number and street name in the **Address Line** field.
      iii. Click the **find address** button.
      iv. Select the appropriate address from the **Addresses Found** menu.
   d. Click the **continue** button to save the information and return to the **New Case Victim** screen.
5. To add a victim already recorded in the Youth Justice system:
   a. Start entering the victim's name into the **Victim** field. A list of victims who match the entered text and are already recorded in the Youth Justice system is displayed.
   b. Select the victim from the **Victim** list.
   c. Click the **+** icon to add the victim to the record.
6. Complete the relevant fields.
7. To add an intervention type:
   a. From the **RJ Intervention Types** drop-down, select the required intervention.
   b. Click the **+** icon to add it to the victim record.
   c. If required, amend the **Date**.

8. Link the offence of which the person is a victim:
    a. Click the **link offence** button to display the **Link Offence** dialog.



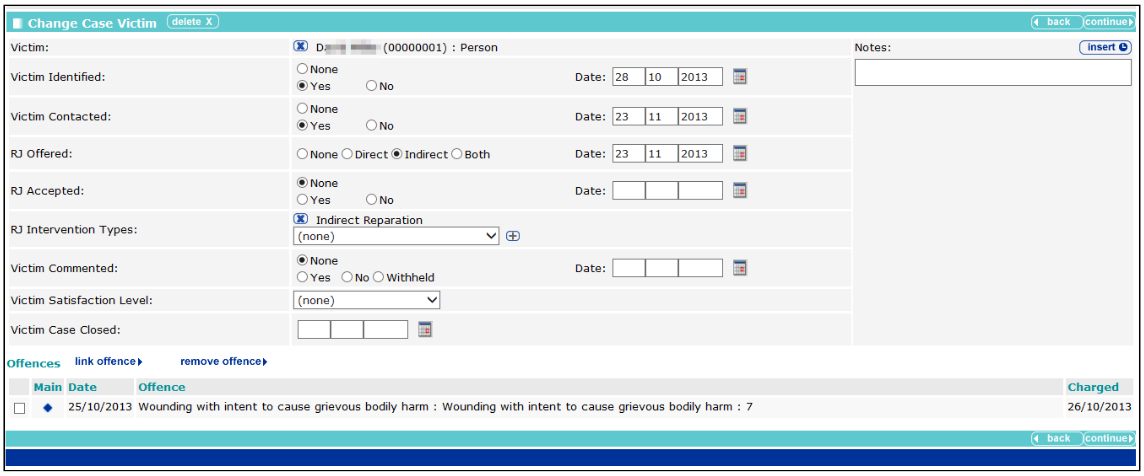
    b. Select the all relevant offences.
    c. Click the **continue** button to link the offences and return to the **New Case Victim** screen.

9. Click the **continue** button to save the information and return to the client record.

Victim Process Recording

To update reparation information:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Victims** panel, click the relevant record to display the **Change Case Victim** screen.



3. Update the relevant information.
4. To add multiple **RJ Intervention Types**:
    a. Select the intervention from the **RJ Intervention Type** menu.

b. Click the **+** icon to add it to the record.

c. Repeat steps a-b as necessary.

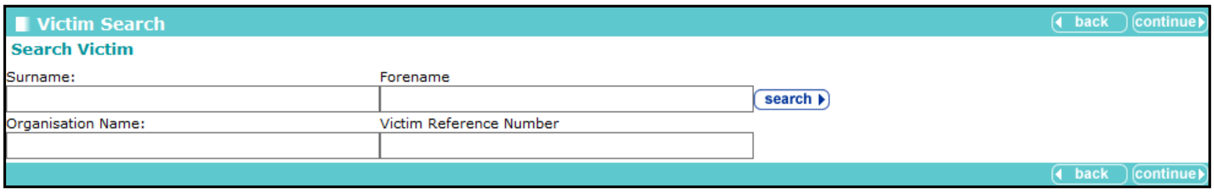
5. Click the **continue** button to save the updated information and return to the client record.

> ***NOTE****: If the intervention is not available in the* ***RJ Intervention Type*** *menu, contact your system administrator to update the menu options.*

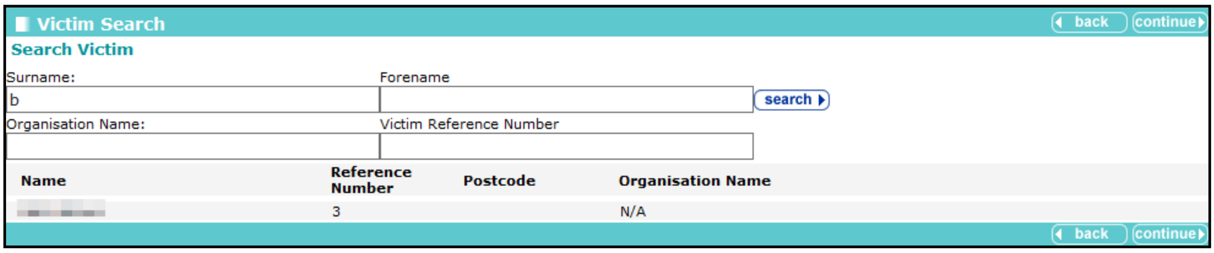
Deleting a Victim Record

Users with the “YJ Case – Victim - Delete” permission can delete a victim record. Deleting a victim record removes all victim details from Youth Justice. Deleting a victim record also removes all mention of the victim from any incidents to which it had previously been attached.

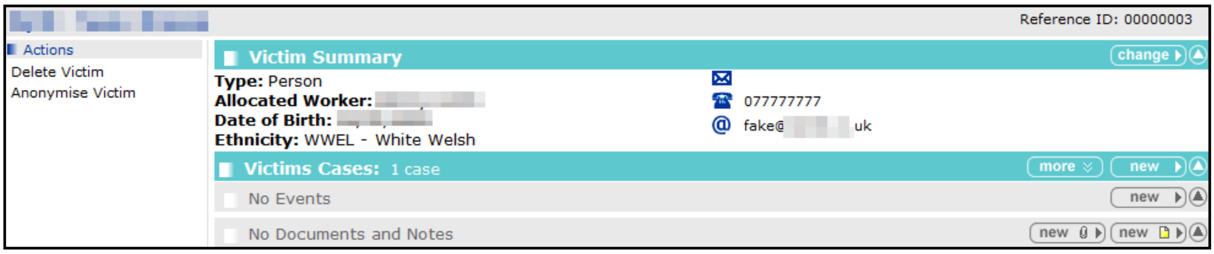
1. From the **IYSS Links** section of the homepage, select the Victim Search hyperlink to display the **Victim Search** panel.



2. Enter the search criteria for the victim you want to delete, and click the **search** button. Any victims who meet the search criteria are displayed.



3. Click the victim’s name to display their details.



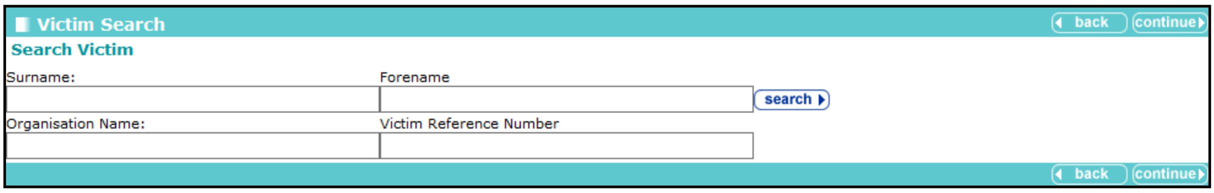
4. In the **Actions** menu, click the **Delete Victim** hyperlink to display a confirmation dialog.

5. Click the **OK** button to remove all victim details from the system.

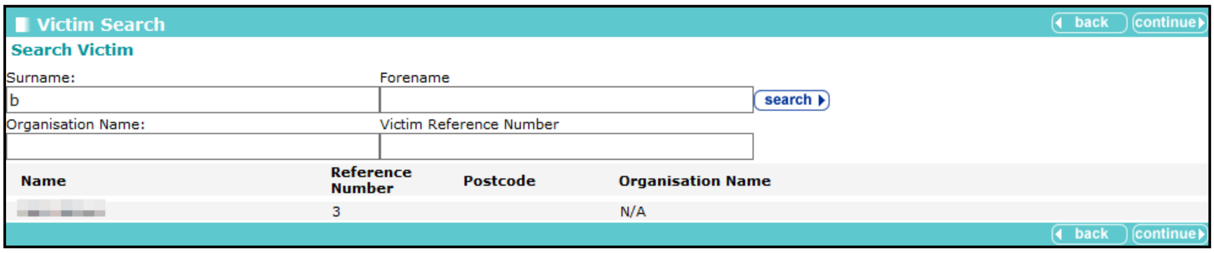
Anonymising a Victim Record

Users with the “YJ Case – Victim - Anonymise” permission can anonymise a victim record. Anonymising a record removes any identifying information about the victim. The only details that are retained are the worker that is allocated to the victim, the victim’s type (e.g. a person or a business) and the Youth Justice specific number allocated to the victim.

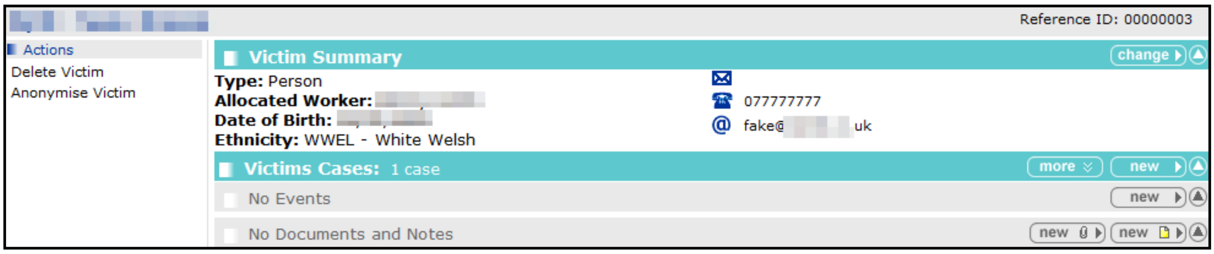
1. From the **IYSS Links** section of the homepage, click the **Victim Search** hyperlink to display the **Victim Search** panel.



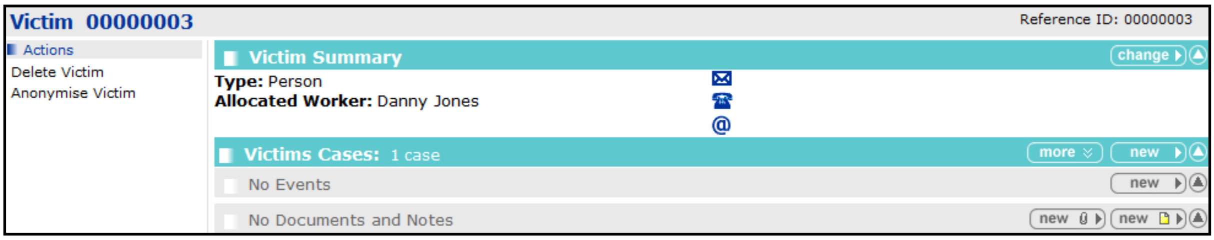
2. Enter the search criteria for the victim you want to anonymise, and click the **search** button to display any victims who meet your search criteria.



3. Click the victim's name to display their details.

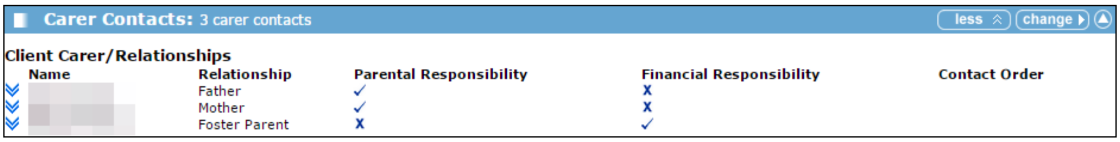


4. In the **Actions** menu, click the **Anonymise Victim** hyperlink to display a confirmation dialog.
5. Click the **OK** button to remove any identifying information.



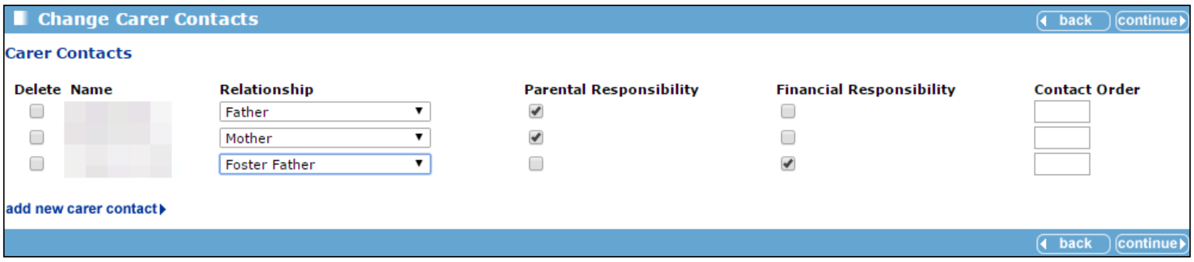
19 | Parenting Orders

Parents and guardians are recorded in the **Carer Contacts panel**. If there are no carers listed in this panel, or if the required carer is not yet listed, they must be entered into IYSS before a parenting order can be created. The **Carer Contacts** panel is grey and reads **No Carer Contacts** if none have been recorded.

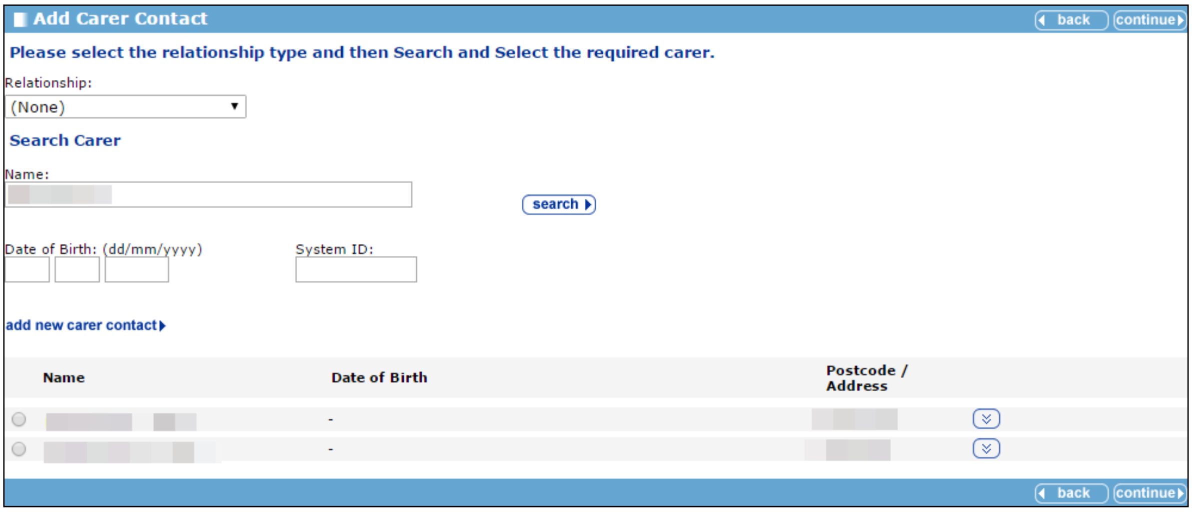


Adding a New Parent or Carer

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Carer Contacts** panel, click the **change** button to display the **Change Carer Contacts** screen.

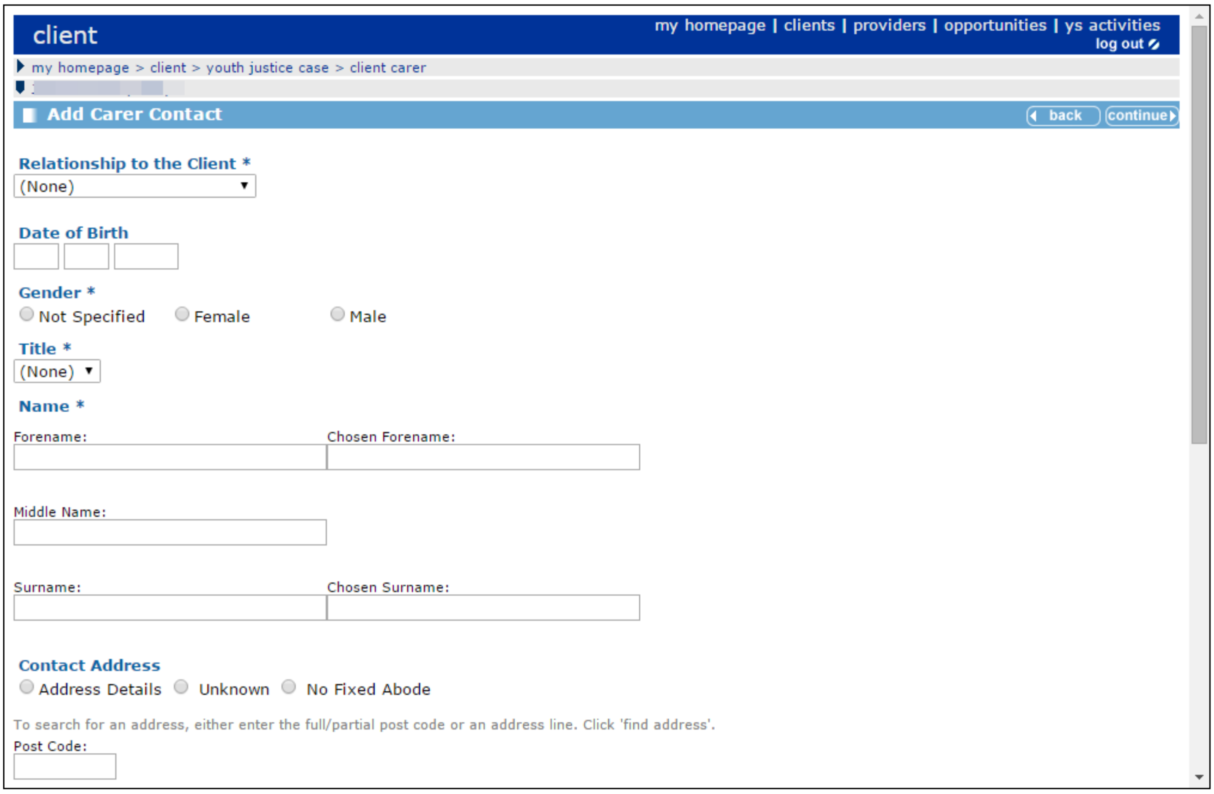


3. Click the **add new carer contact** button to display the **Add Carer Contact** screen.



4. Select the **Relationship** from the menu.
5. Enter the carer's **Name**.
6. If known, enter the carer's **Date of Birth**.
7. If known, enter the carer's **System ID**.
8. Click the **search** button to display a list of matching carers.

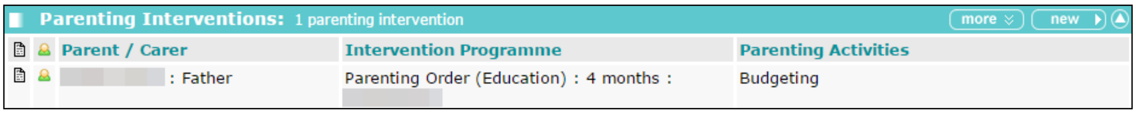
9. If the person is already on the system:
   a. Select the radio button for the appropriate carer.
   b. Click the **continue** button to add the person to the **Change Carer Contacts** screen.
10. If a **No Clients Found** message is displayed:
    a. Click the **add new carer contact** button to display the **Add Carer Contact** screen.



    b. Complete all known fields.
    c. To enter the address:
       i. Enter the **Post Code**.
       ii. Enter the house number and street name on the **Address Line**.
       iii. Click the **find address** button.
       iv. Select the correct address from the **Addresses found** menu.
    d. Click the **continue** button to add the person to the **Change Carer Contacts** screen.
11. If required, select the **Parental Responsibility** check box.
12. If required, select the **Financial Responsibility** check box.
13. If required, complete the **Contact Order** field.
14. Click the **continue** button to save the carer details and return to the client record.

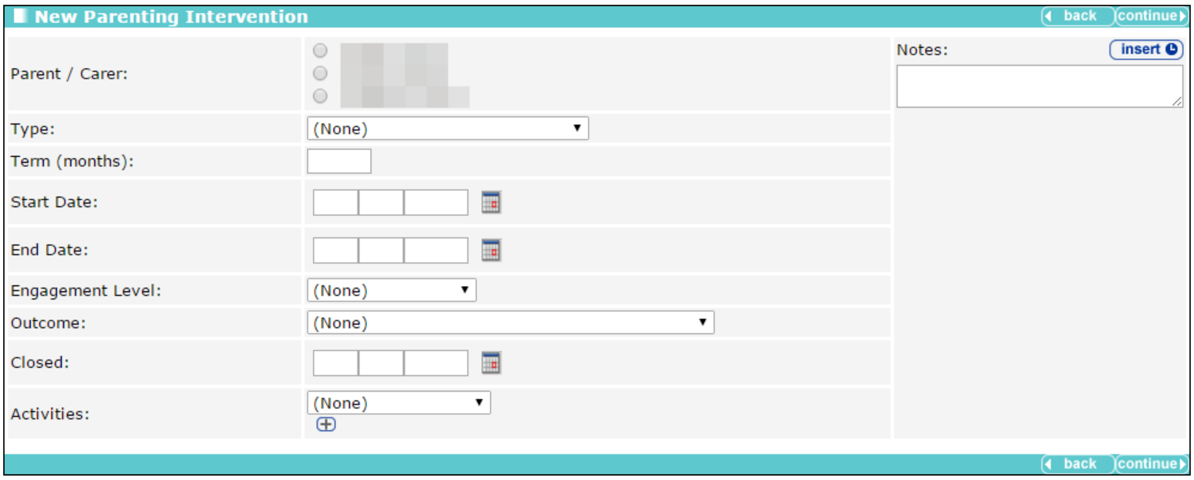
Creating Parenting Interventions

Parent and carer intervention records are displayed in the **Parenting Interventions** panel. If your client has no interventions then panel header is grey and reads **No Parenting Interventions.**



To create a new parenting intervention:

1. Access the required client record. For more information, see [Accessing Client Records]() on page *13*.
2. In the **Parenting Interventions** panel, click the **new** button to display the **New Parenting Intervention** screen.

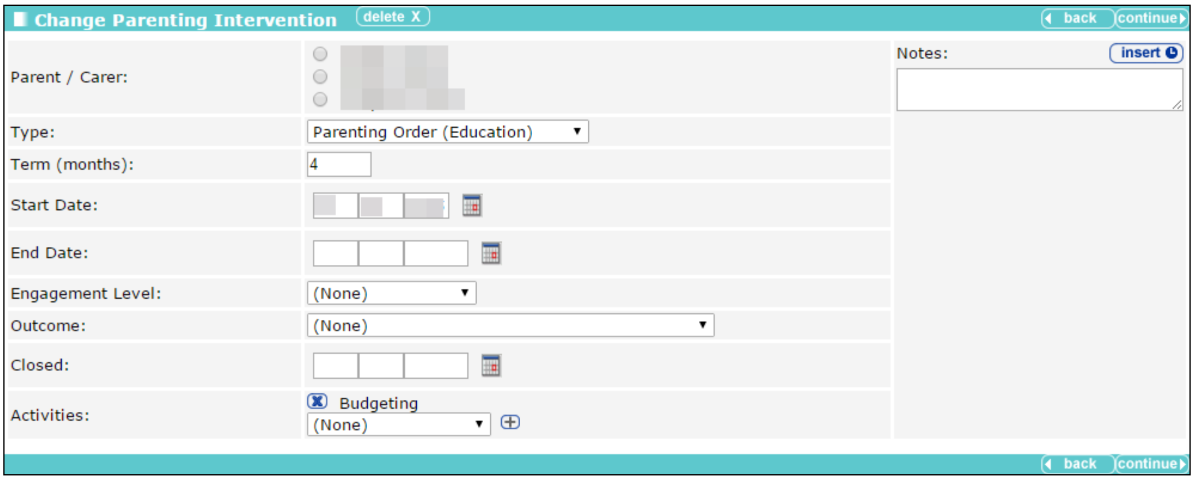


3. Select the **Parent / Carer** responsible for the intervention.
4. Enter all known relevant information.
5. Click the **continue** button to save the intervention and return to the client record.

Editing a Parenting Intervention

1. Access the required client record. For more information, see [Accessing Client Records]() on page *13*.

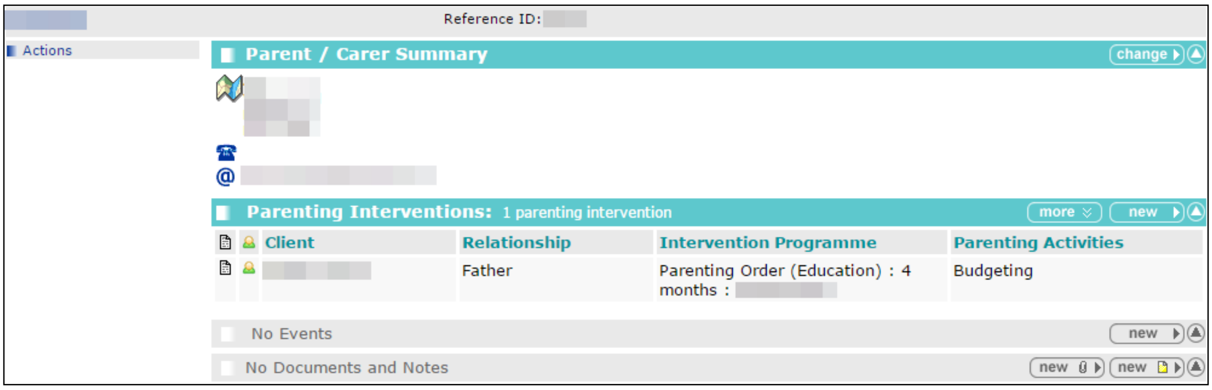
2. In the **Parenting Interventions** panel, click the name of the parent or carer responsible for the required intervention to display the **Change Parenting Intervention** screen.



3. Enter the new information.
4. Make sure you reselect the **Parent / Carer** responsible.
5. Click the **continue** button to save the intervention and return to the client record.

Accessing Parent/Carer Records

The **parentcarer** screen contains basic personal details, including a history of addresses, and contact details. It displays any linked interventions, events and documents or notes. You can access parent or carer with intervention records in two ways.



To access the record from **my homepage**:

1. In the **IYSS Links** panel, click the **Parents with Interventions Search** hyperlink to display the **Parent / Carer Search** screen.
2. Enter the **Name** or **Reference Number** of the required parent or carer.
3. Click the **Search** button to display a list of matching parents or carers.
4. Select the required **parent / carer** from the menu to display the **Parent / Carer Summary** screen.

***NOTE**: A parent/carer record is created automatically when a parenting intervention is created for a young person.*

If the client has a **Parenting Intervention** on record, you can open the appropriate **parentcarer** screen from the client record. To do this:

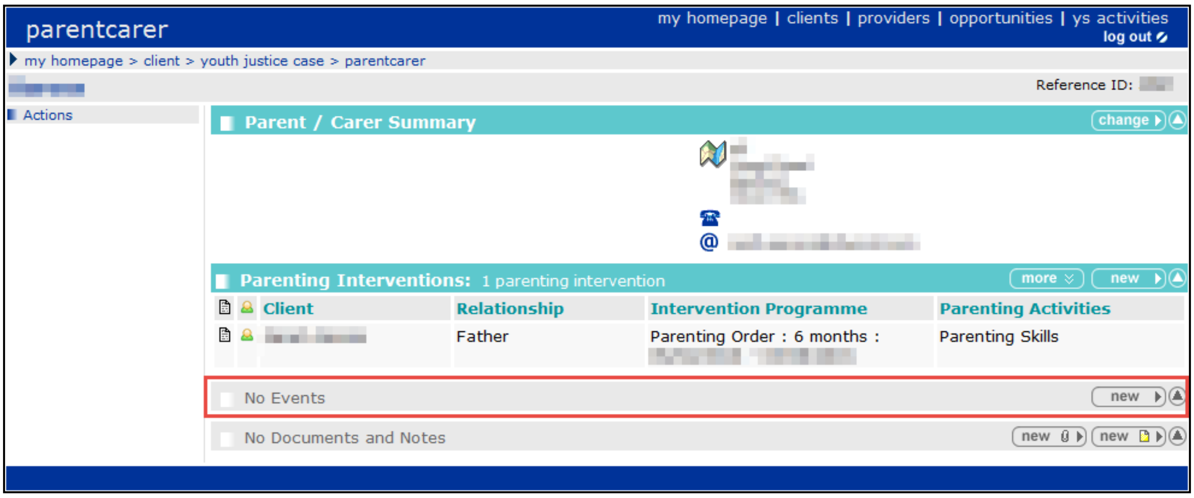
1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Parenting Interventions** panel, click the **Person** icon next to the name of the required parent or carer to display the **parentcarer** screen.

 *Person icon*

> ***NOTE***: *Clicking the name and relationship of the parent in the* ***Parent / Carer*** *column displays the* ***Change Parenting Intervention*** *screen, not the* ***parentcarer*** *record.*

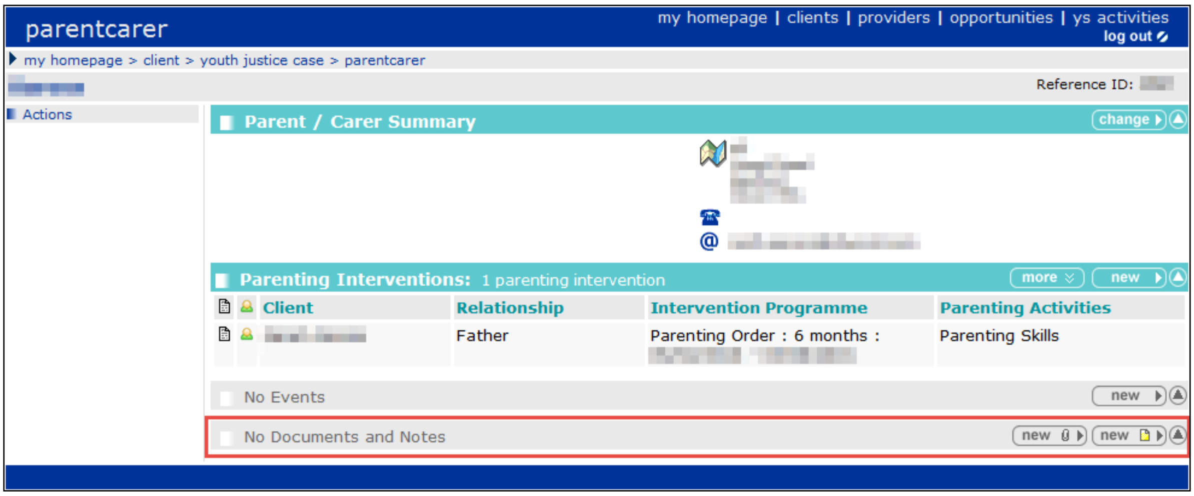
Recording a New Event for a Parent/Carer

Events are created and linked to the parent/carer record in the same way as they are for the client record. The **Parenting Interventions**' **Events** panel is accessed through the **parent / carer** screen. For more information about adding an event, see Creating a New Event on page *41.*



Adding Documents to a Parent/Carer Record

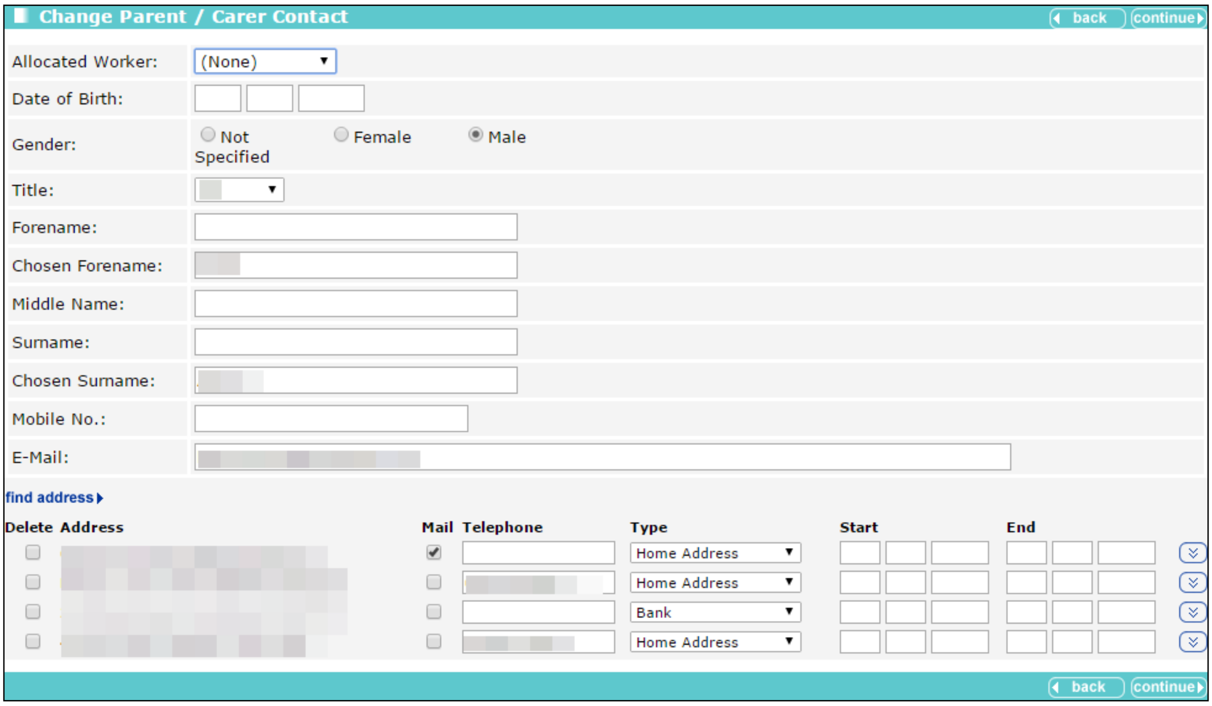
Documents can be added to a parent/carer record in the same way as they are attached to a young person's record. The **Parenting Interventions' Documents and Notes** panel is accessed through the **parentcarer** screen.For more information, see Adding Documents to a Young Person's Record on page *119*.



Editing Parent/Carer Details

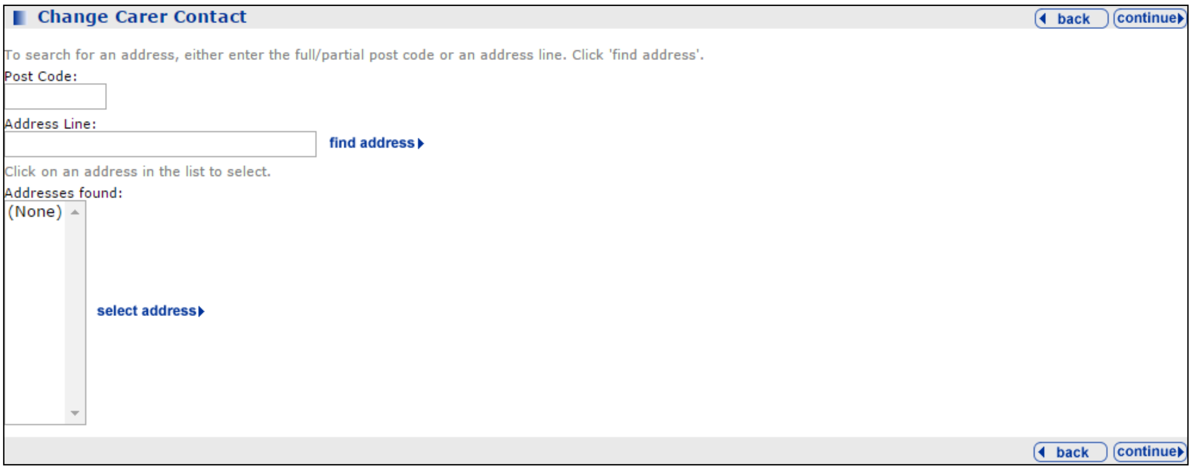
To update parent or carer details, or allocate a worker to them:

1. Access the required parent/carer record. For more information on doing this, see Accessing Parent/Carer Records on page *95*.
2. In the **Parent / Carer Summary** panel, click the **change** button to display the **Change Parent / Carer Contact** screen.



3. If required, select an **Allocated Worker** from the menu.
4. If required, update all relevant fields.
5. To add a new address:

   a. Click the **find address** button to display a new **Change Carer Contact** screen.



   b. Enter the Post Code

   c. In the **Address Line** field, enter the house number and street name.

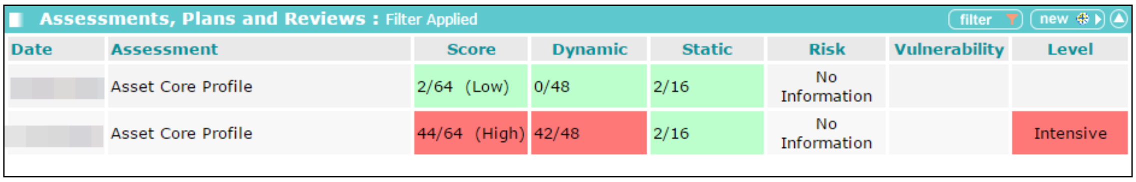
   d. Click the **find address** button to display a list of options in the **Addresses found** field

   e. Select the appropriate address.

6. Click the **continue** button to add the address to the record.
7. Click the **continue** button to save the record and return to the **Parent / Carer Summary** screen.

20 | Asset Completion

Assets are managed in the **Assessments, Plans and Reviews** panel. If your client has no assessments, plans or reviews on record, the panel header is grey and reads **No Assessments, Plans and Reviews**.



Assessments, Plans and Reviews : Filter Applied

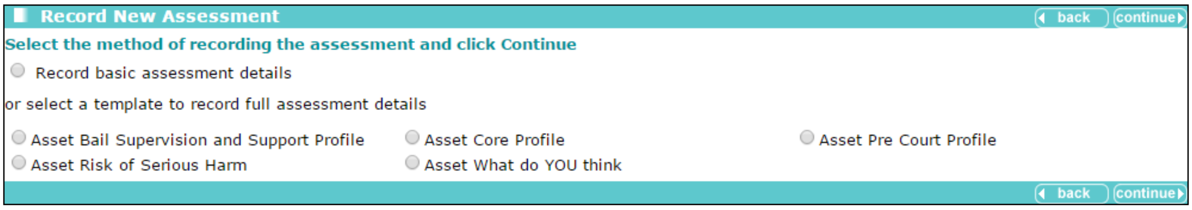
Date	Assessment	Score	Dynamic	Static	Risk	Vulnerability	Level
	Asset Core Profile	2/64 (Low)	0/48	2/16	No Information		
	Asset Core Profile	44/64 (High)	42/48	2/16	No Information		Intensive

Creating a New Asset Assessment (Complete)

Completing a full asset assessment can be a lengthy process. If you only have limited information or time available, please refer to the Creating a New Asset Assessment (Incomplete) section on page *101*.

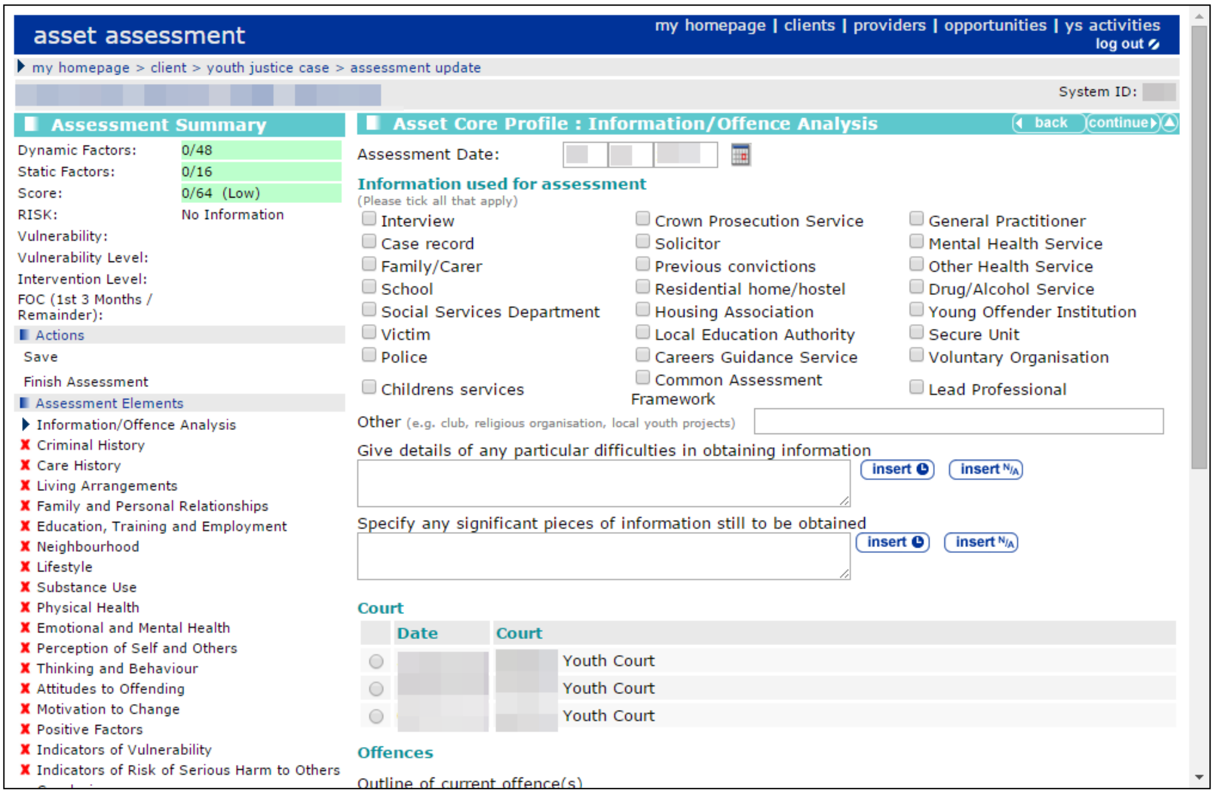
To create a complete new asset:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Assessments, Plans and Reviews** panel, click the **new** button to display the **Record New Assessment** screen.



3. Select the **Asset Core Profile** radio button.

4. Click the **continue** button to display the **asset assessment** screen.



5. In the **Asset Core Profile : Information/Offence Analysis** panel, enter all known relevant information.
6. If required, amend the **Assessment Date**.
7. In the **Court** table, select the appropriate court appearance radio button to display the **Offences** table.
8. As required, link the related **Offences** by selecting the appropriate check boxes.
9. In the **Primary** column, select the appropriate radio button.
10. Click **continue** to save the information entered and display the **Asset Core Profile : Information/Offence Analysis** panel.
11. Enter all known information.
12. Click the **continue** button to save the information and display the next panel.
13. Repeat steps 11 and 12 until the **Conclusion** panel is completed.
14. If you need to interrupt the process, click the **Save** hyperlink in the list on the left-hand side to save progress.
15. Click the **continue** button to save the information and display the Asset Core Profile : Assessment Summary panel.

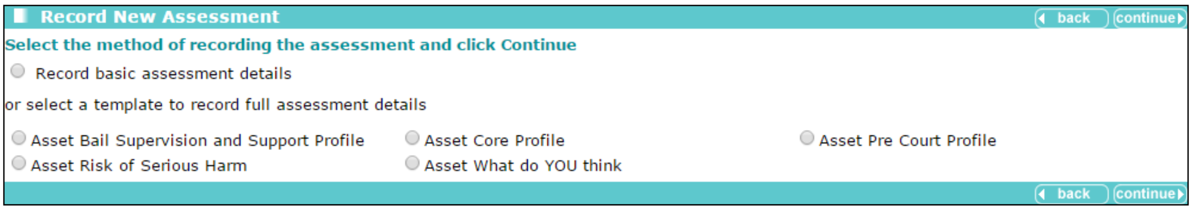
> ***NOTE**: **Living Arrangements**, and all other elements until and including **Motivation to Change** must be rated in terms of their connection with the risk of re-offending. There is an option to **Include this element in plan**. If you wish to create an intervention plan select this check box (see Creating an Intervention Plan from the Asset Assessment on page 103), If you rate any element as 3 or 4, the check box is automatically selected.*

Creating a New Asset Assessment (Incomplete)

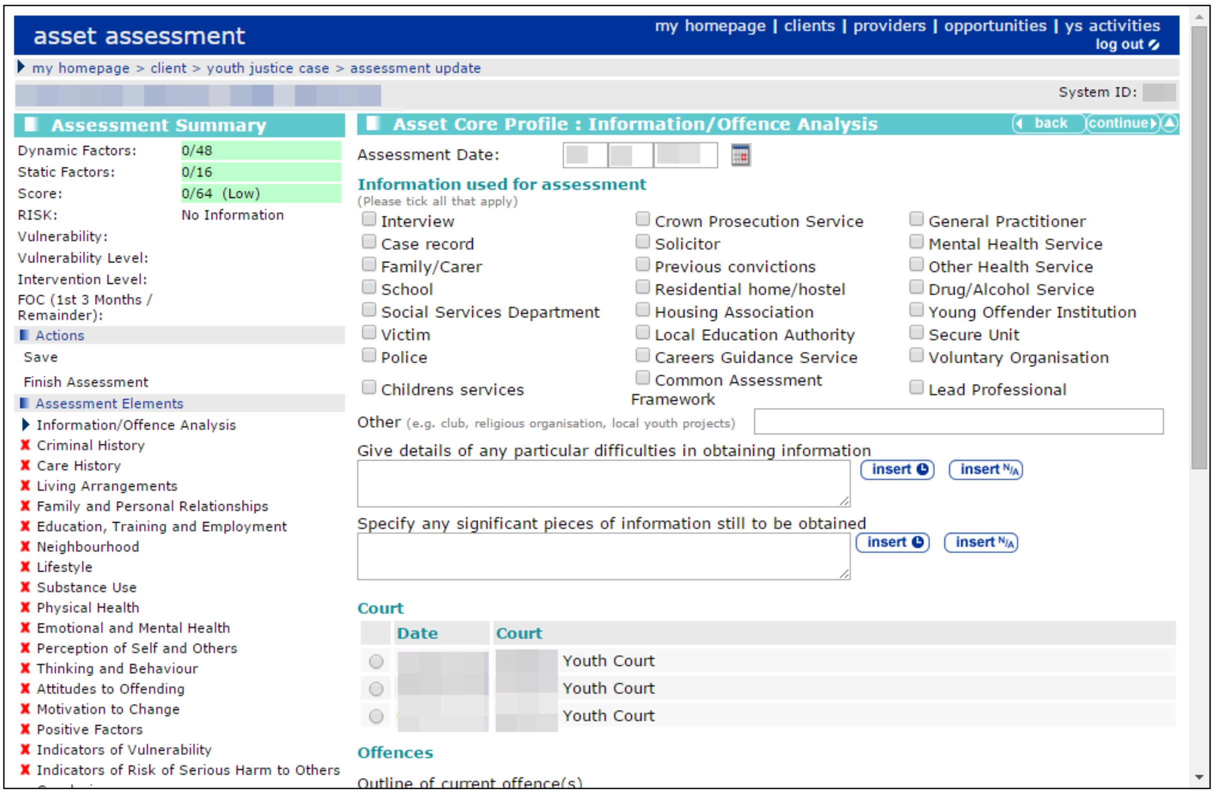
If you have a limited amount of information or time, and cannot work through the entire assessment, you can complete select sections. To revisit or complete the assessment at a later date, see Viewing and Editing an Asset Assessment on page *102*.

To create an incomplete new asset:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Assessments, Plans and Reviews** panel, click the **new** button to display the **Record New Assessment** screen.



3. Select the **Asset Core Profile** radio button.
4. Click the **continue** button to display the **asset assessment** screen.



5. In the **Assessment Elements** list on the left-hand side, click the appropriate hyperlink to display the **Asset Core Profile** panel for the relevant section.
6. Enter all relevant information.
7. In the **Actions** menu on the left-hand side, click the **Save** hyperlink to save the information.

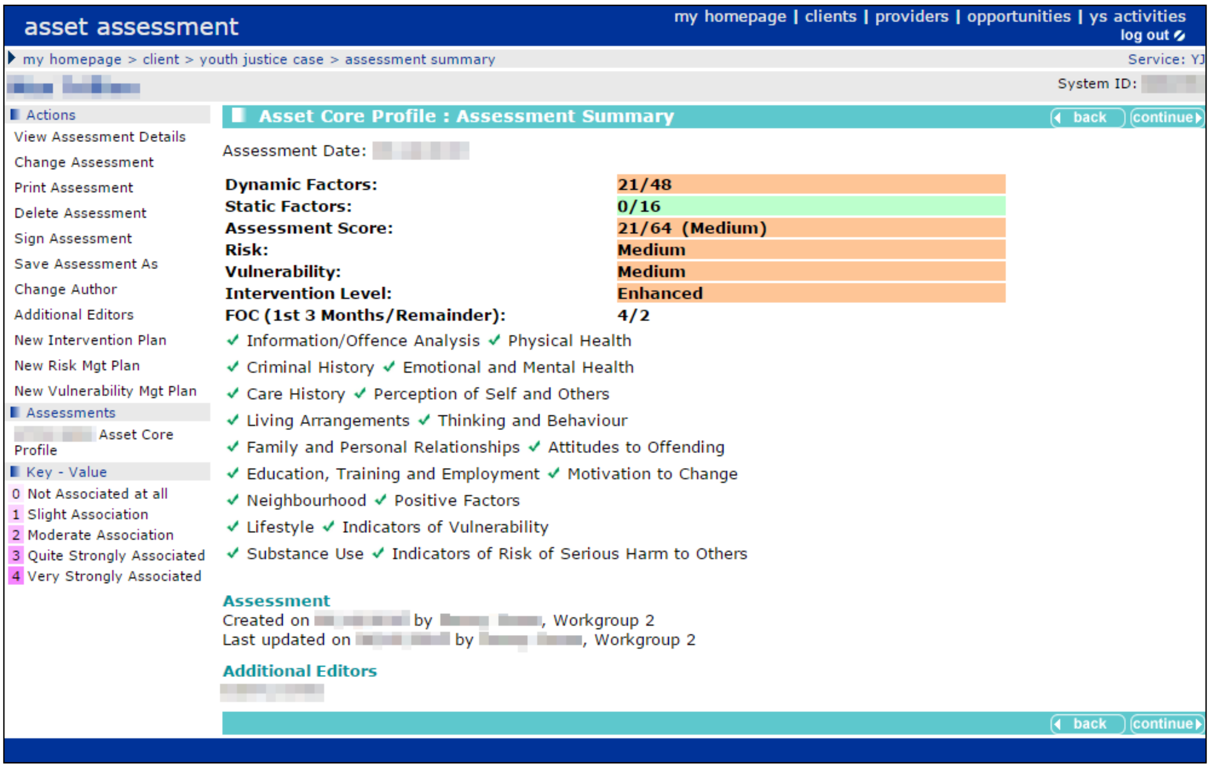
8. If required, complete other areas the same way.

> ***NOTE**: **Living Arrangements**, and all other elements until and including **Motivation to Change** must be rated in terms of their connection with the risk of re-offending. There is an option to **Include this element in plan**. If you wish to create an intervention plan select this check box (see [Creating an Intervention Plan from the Asset Assessment](#) on page* 103*), If you rate any element as 3 or 4, the check box is automatically selected.*

Viewing and Editing an Asset Assessment

To view, complete, or update an asset assessment record:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Assessments, Plans and Reviews** panel, click the date of the required assessment to display the **Asset Core Profile : Assessment Summary** screen.



3. In the **Actions** menu on the left-hand side, click the **Change Assessment** hyperlink to display the **Asset Core Profile : Information/Offence Analysis** panel.

4. In the **Assessment Elements** list on the left-hand side, click the appropriate hyperlink to display the **Asset Core Profile** panel for the relevant section. The elements denoted by a red **x** contain incomplete fields and should be completed to enable the assessment to be signed.

5. In the **Asset Core Profile** panel, enter all relevant information.
6. In the **Actions** menu on the left-hand side, click the **Save** hyperlink to save the information.
7. If required, complete other areas the same way.

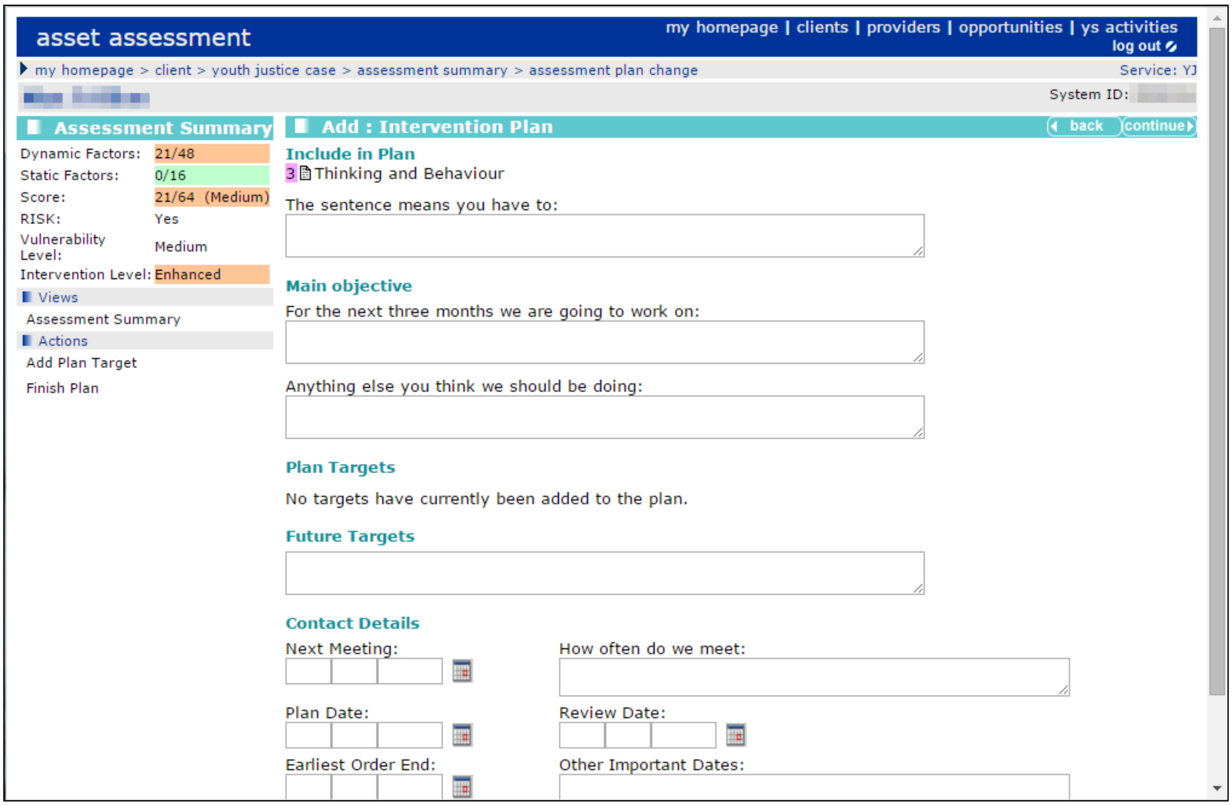
> ***NOTE***: ***Living Arrangements***, *and all other elements until and including* ***Motivation to Change*** *must be rated in terms of their connection with the risk of re-offending. There is an option to* ***Include this element in plan****. If you wish to create an intervention plan select this check box (see* *Creating an Intervention Plan from the Asset Assessment* *on page* 103*), If you rate any element as 3 or 4, the check box is automatically selected.*

Creating an Intervention Plan from the Asset Assessment

To create a new intervention plan from the asset assessment:

1. Access the required assessment. For more information on opening asset assessments, see Viewing and Editing an Asset Assessment on page *102*.

2. In the **Actions** menu on the left-hand side, click the **New Intervention Plan** hyperlink to display the **Add : Intervention Plan** screen.



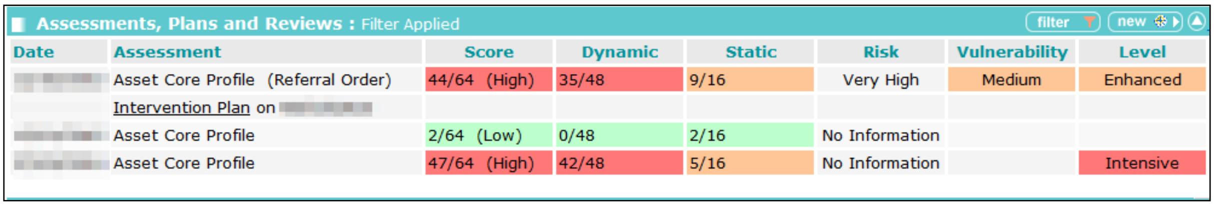
3. Complete the relevant fields.
4. Check that all of the desired elements are listed under the **Include in Plan** header.
5. If required, edit the elements in the plan. To do this:
   a. In the **Views** list, click the **Assessment Summary** hyperlink to display the **Asset Core Profile : Assessment Summary** screen.
   b. In the **Actions** menu on the left-hand side, click the **Change Assessment** hyperlink to display the **Asset Core Profile** screen.
   c. In the **Assessment Summary** panel, click the desired **Assessment Element** hyperlink to display the appropriate element.
   d. Select or deselect the **Include this element in plan** check box as required.
   e. In the **Actions** menu, click the **Save** hyperlink.
   f. If required, repeat steps c, d and e for other relevant elements.

   > ***NOTE***: *Elements with a risk level of 3 or 4 will automatically be included in the plan. These may be removed from the plan manually.*

6. To add a plan target to the intervention:
   a. In the **Actions** menu click the **Add Plan Target** hyperlink to display the **Add : Plan Target** screen.
   b. If required, in the **Assessment Elements** panel select the relevant check boxes.
   c. Click the **continue** button to save the target and return to the **New Intervention** screen.

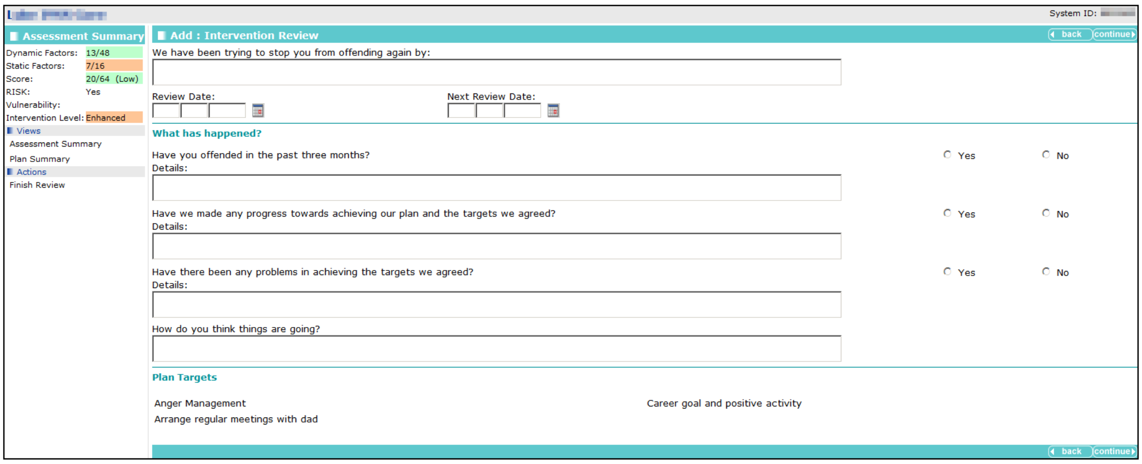
Completing an Intervention Plan Review

Once created, intervention plans can be accessed directly from the client record. They are displayed in the **Assessments, Plans and Reviews** panel, immediately below the assessment from which they were created.

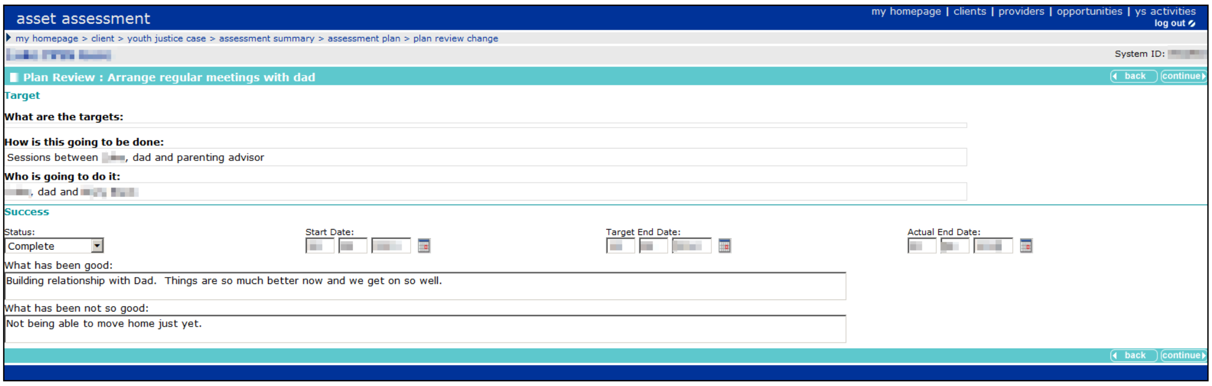


To complete an intervention plan review:

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Assessments, Plans and Reviews** panel, click the required intervention plan to display the **Intervention Plan** screen.
3. In the **Actions** menu on the left-hand side, click the **Add Intervention Review** hyperlink to display the **Add : Intervention Review** screen.

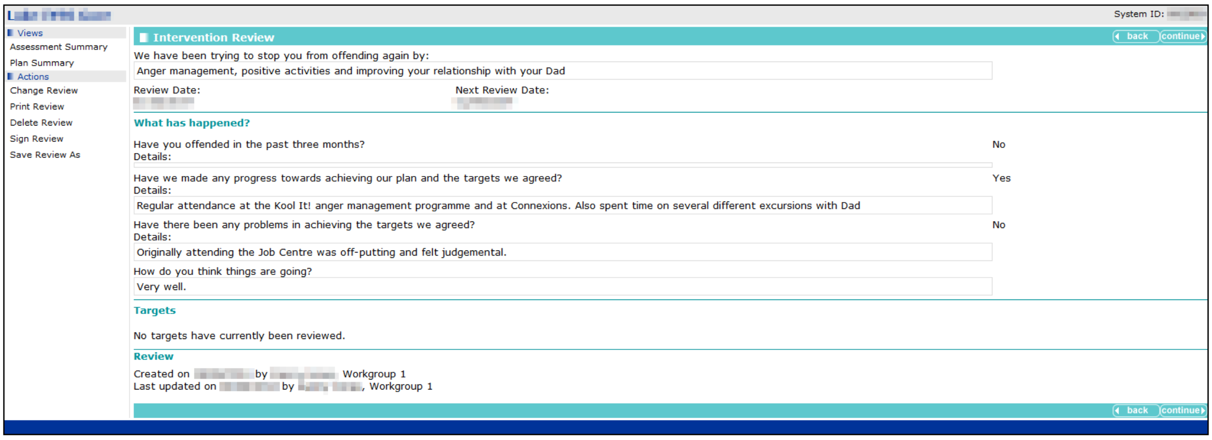


4. Complete the relevant sections.
5. If required, review the **Plan Targets**:
   a. Click the relevant target in the **Plan Targets** panel to display the **Plan Review** screen.



   b. As required, complete the fields under the **Success** header.
   c. Click the **continue** button to save the information and return to the **Add : Intervention Review** screen.

6. Click the **continue** button to save the information and display the **Intervention Review** screen.

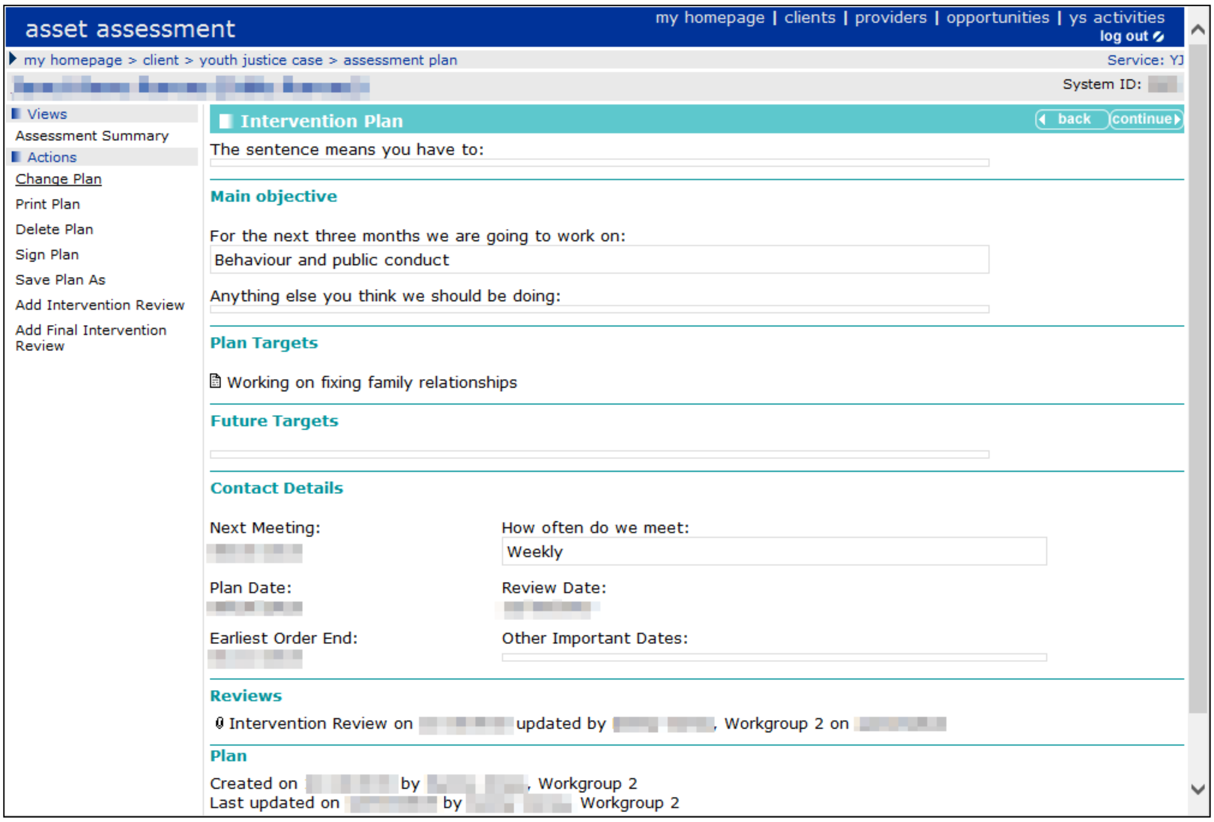


7. If the review is complete, in the **Actions** menu, click the **Sign Review** hyperlink to display the confirmation dialog.
8. Click the **OK** button to confirm the signature.

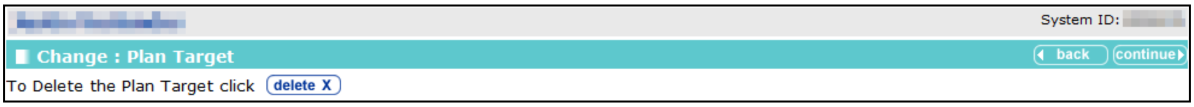
Removing Plan Targets from Intervention Plans

To remove a plan target:

1. Ensure you have the necessary permissions to delete plan targets. If you do not have, or do not know if you have these permissions, please contact your System Administrator.
2. In the **Assessments, Plans and Reviews** panel, click the required plan to display the Intervention Plan screen.
3. In the **Actions** menu, click the **Change Plan** hyperlink to display the **Change : Intervention Plan** screen.



4. In the **Plan Targets** section, click the required target to display the **Change : Plan Target** screen.



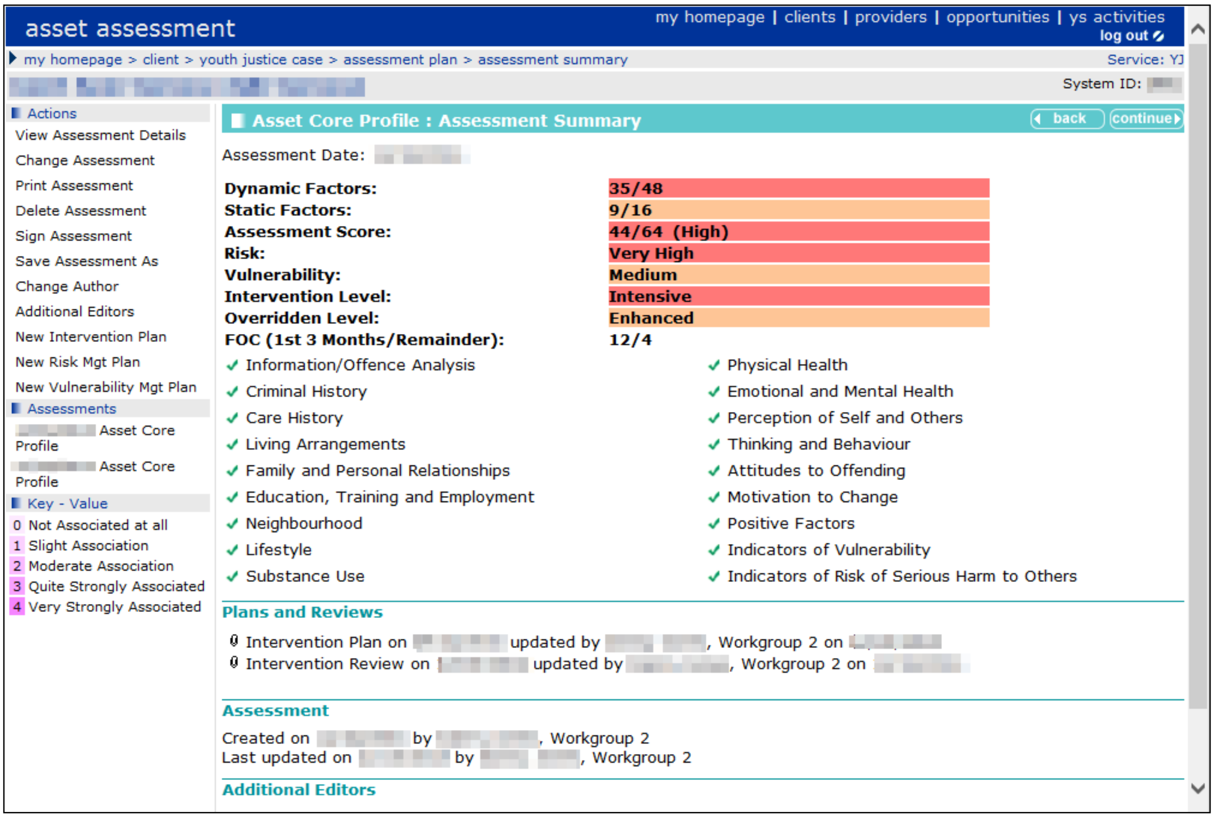
5. Click the **Delete** button to display a confirmation dialog.
6. Click the **OK** button to confirm deletion and return to the **Change: Intervention Plan** page.

Updating an Assessment

From the **Assessment Summary**, it is possible to delete, sign, or edit the assessment.

To update the assessment:

1. Access the required **Assessment Summary**. For more information on this, see [Viewing and Editing an Asset Assessment] on page *102*.



2. To edit an assessment:

   In the **Actions** menu click the **Change Assessment** hyperlink to display the **Asset Core Profile.** For more information on completing this section, see [Creating an Intervention Plan from the Asset Assessment] on page *103*.

3. To sign off an assessment, if all assessment scoring is complete:
   a. In the **Actions** menu click the **Sign Assessment** hyperlink to display a confirmation dialog.
   b. Click the **OK** button to confirm sign off.
4. To delete an assessment:
   a. In the **Actions** menu, click the **Delete Assessment** button to display a confirmation dialog.
   b. Click the **OK** button to confirm deletion.

5. To duplicate an assessment:
   a. In the **Actions** menu, click the **Save Assessment As** button to display a confirmation dialog.
   b. Click the **OK** button to confirm duplication.

Adding Multiple Editors to an Assessment

To give additional Youth Justice users editorial permission for a particular assessment asset, you must be either an author or member of a security group with “YJ Assessments – Change Editors” permissions granted.

To assign multiple editors:

1. Ensure you have the required permission to make the changes.
2. Access the required Assessment Summary. For more information on this, see Viewing and Editing an Asset Assessment on page *102*.
3. In the **Actions** menu, click the **Additional Editors** hyperlink to display the **Additional Editors** panel.

4. Select the required editor from the **User** menu.
5. Click the **add** button to add them to the list of editors.
6. Click the **continue** button to save the update and return to the client record.

Removing Editors from an Assessment

To revoke a Youth Justice user’s editorial permission for a particular assessment asset, you must be either the author or a member of a security group with “YJ Assessments – Change Editors” permissions granted.

To remove editors:

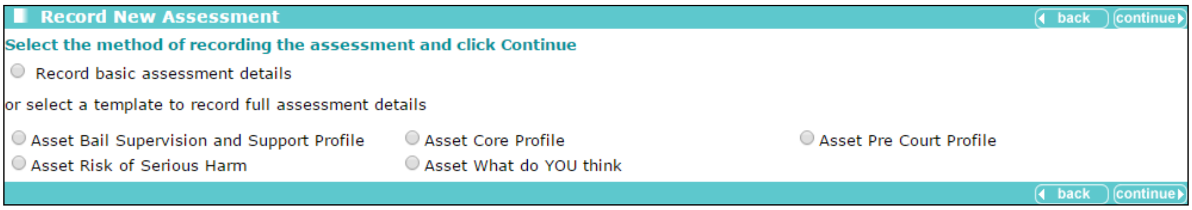
1. Ensure you have the required permission to make the changes.
2. Access the required **Assessment Summary**. For more information on this, see Viewing and Editing an Asset Assessment on page 102.
3. In the **Actions** menu, click the **Additional Editors** hyperlink to display the **Additional Editors** panel.

4. Click the **x** icon next to the name of the editor you want to remove.

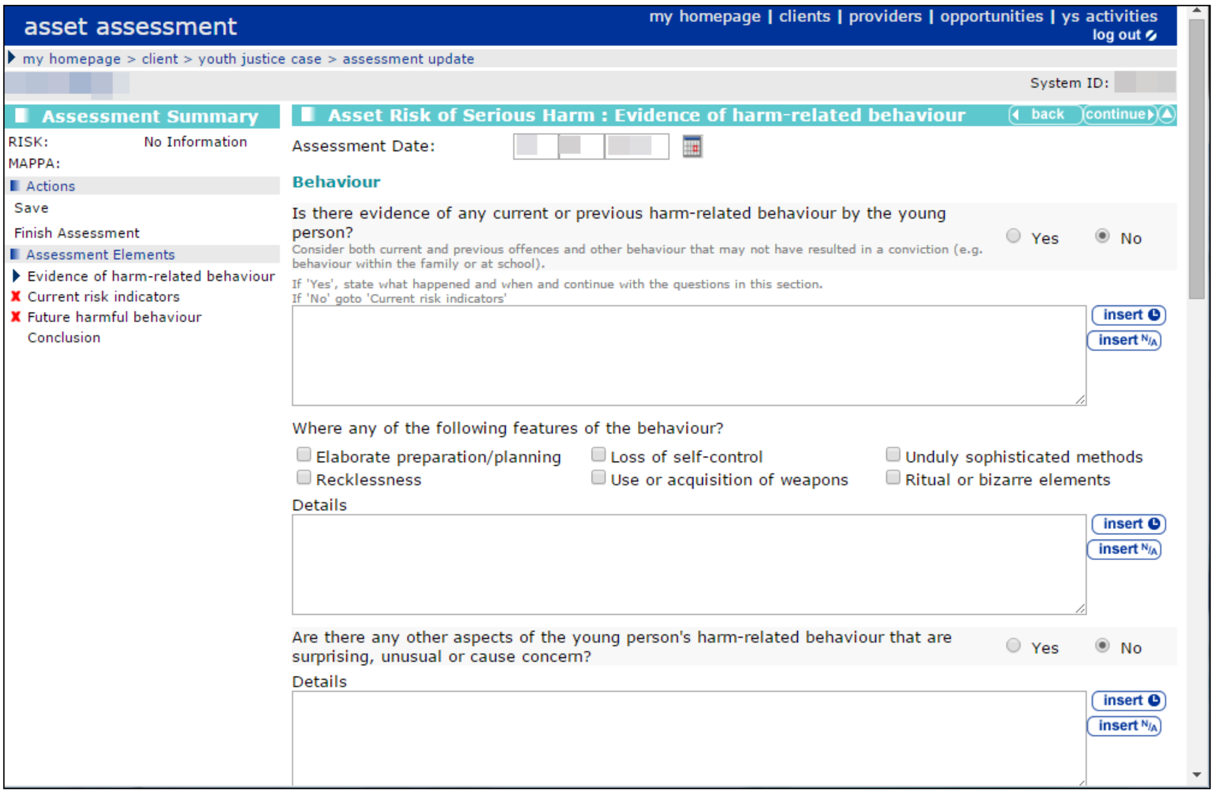
5. Click the **continue** button to save the update and return to the client record.

21 | Recording a Risk of Serious Harm

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Assessments, Plans and Reviews** panel, click the **new** button to display the **Record New Assessment** screen.



3. Select the **Asset Risk of Serious Harm** radio button.
4. Click the **continue** button to display the **asset assessment** screen.



5. If required, amend the **Assessment Date**.
6. Complete all relevant fields on the screen.
7. Click the **continue** button to proceed to the next element. A green ✔ indicates that the element is complete. A red **x** indicates that there are still fields requiring completion within the element.

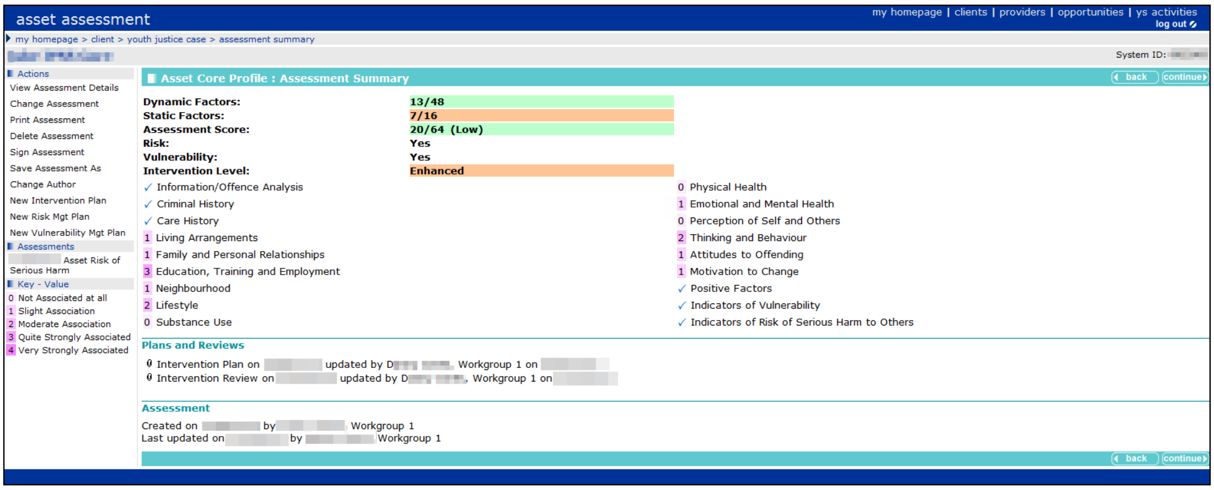
8. Repeat steps 6 and 7 until the **Conclusion** is reached.
9. Select the relevant **Current risk of serious harm to others** radio button.

10. Select the appropriate **MAPPA Level**.
11. Click the **continue** button to save the assessment and display the **Assessment Review** screen.

22 | RMP and VMP Completion

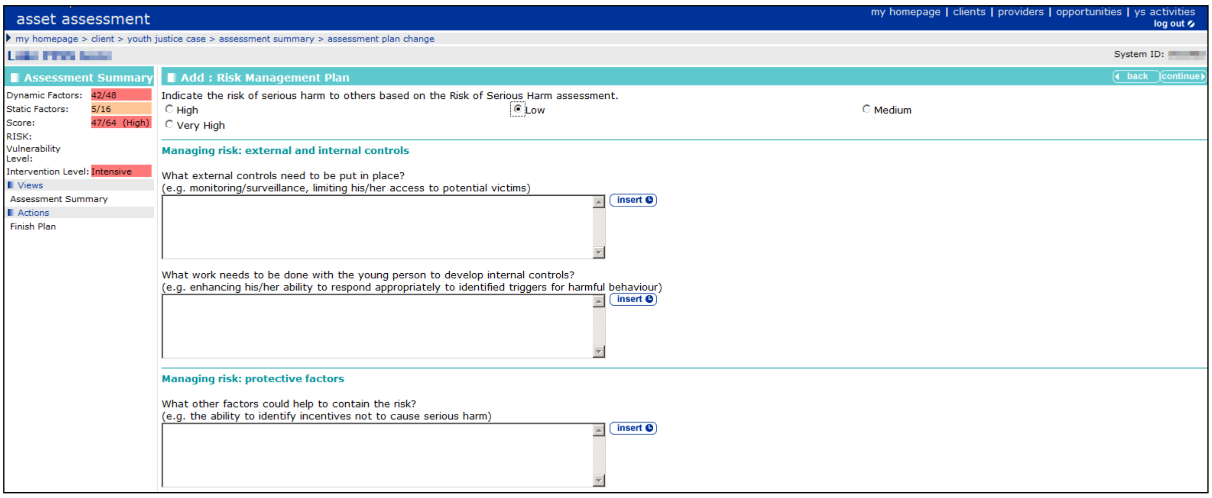
To complete a risk or vulnerability plan:

1. Access the required assessment. For more information on opening asset assessments, see [Viewing and Editing an Asset Assessment](#) on page *102*.



2. In the **Actions** menu on the left-hand side, select the type of plan you need to create:
   - To create a risk management plan, click the **New Risk Mgt Plan** hyperlink to display the **Add : Risk Management Plan** screen.
   - To create a vulnerability management plan, click the **New Vulnerability Mgt Plan** hyperlink to display the **Add : Vulnerability Management Plan** screen.

> ***NOTE:*** *The **Add : Risk Management Plan** and the **Add : Vulnerability Management Plan** screens are structured the same.*



3. Complete the relevant fields and enter the **Review Date**.
4. Click the **continue** button to save the plan and return to the client record.

> ***NOTE:*** *To duplicate a plan, see step 5 of* [*Updating an Assessment*](#) *on page* 107. *Ensure that all information in the duplicate is updated to reflect the current date and case stage. All new plans must be created from the duplicate. When duplicating a plan to create a new one, do not alter the original.*

23 | Gangs and Relationships

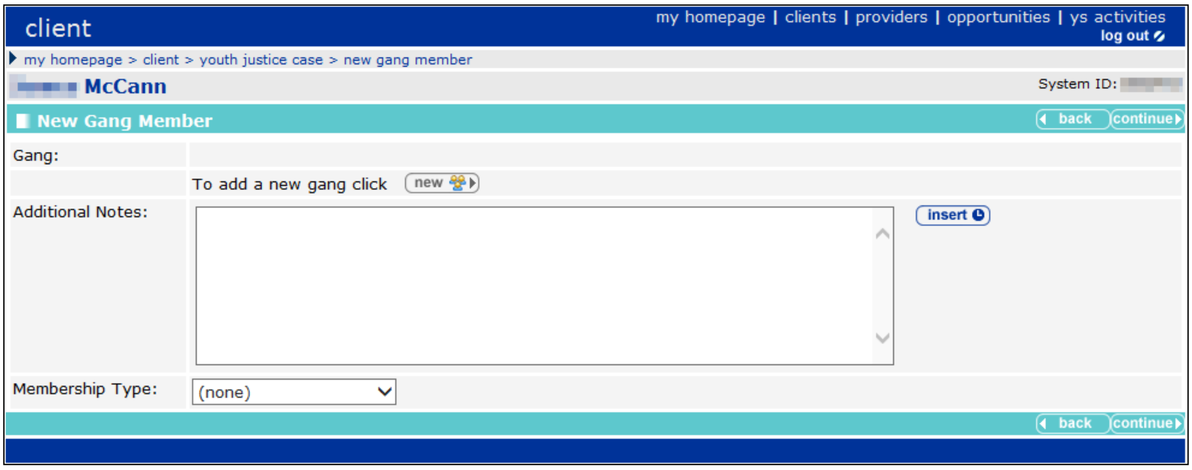
All gang affiliation information is accessed through the **Gangs and Relationships** panel. If there are no known gang affiliations, the panel header is grey, and reads **No Gangs and Relationships.**

Creating New Gangs

To add a client to a gang:

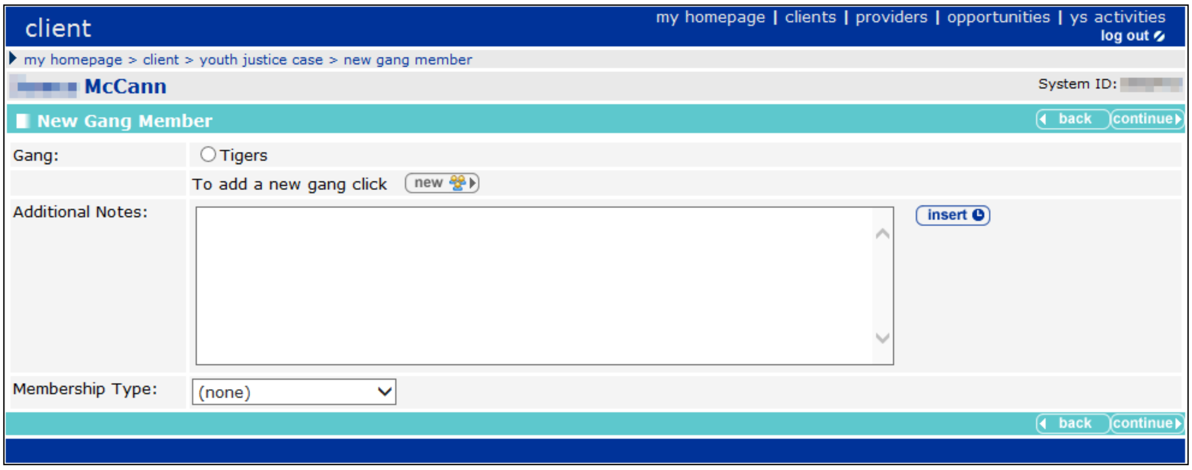
1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Gangs and Relationships** panel, click the **Add a new gang** button to display the **New Gang Member** screen.

Add a new gang button



3. If the required gang is not displayed in the **Gang** field:
   a. Click the **Add a new gang** button to display the **New Gang** screen.
   b. Complete the **Name** and **Geographical Area** fields.
   c. Click the **continue** button to return to the **New Gang Member** screen.

4. Select the appropriate **Gang** radio button.



5. If required, enter any **Additional Notes**.
6. Select the **Membership Type** from the menu.
7. Click the **continue** button to save the gang allegiance and return to the client record.

Viewing Gang Details

To view a summary of the gang:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Gangs and Relationships** panel, click the gang icon of the appropriate gang to display the **Gang** dialog.

 *Gang icon*

Creating a New Relationship

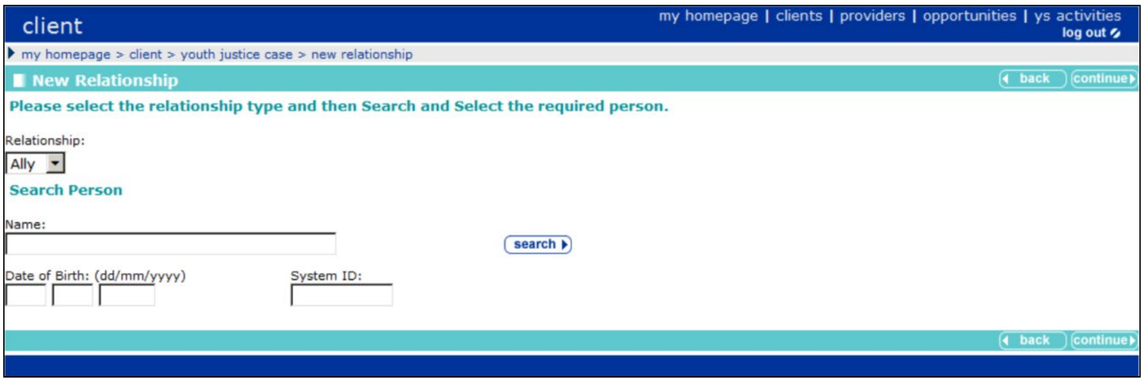
In order to add a relationship to Youth Justice, both parties must already be registered on the system.

To create a relationship:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.

2. In the **Gangs and Relationships** panel, click the **new relationship** button to display the **New Relationship** screen.

New relationship button



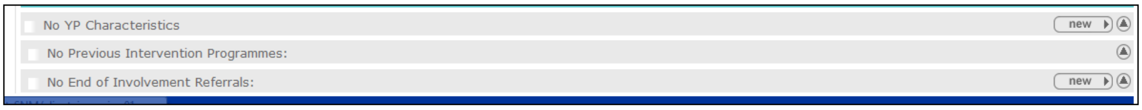
3. Select the **Relationship** from the menu.
4. In the **Search Person** section, enter as much information as you know in the relevant fields.
5. Click the **search** button to display a list of people with matching information.
6. Select the appropriate person by clicking the radio button next to their name.
7. Click the **continue** button to save the relationship and return to the client record.
8. In the **Gangs and Relationships** panel, click the person icon next to the name of the new associate.

Person icon

9. Repeat steps 1 to 7 to link the new associate back to your client.

24 | Adding Characteristics to a Young Person's Case Record

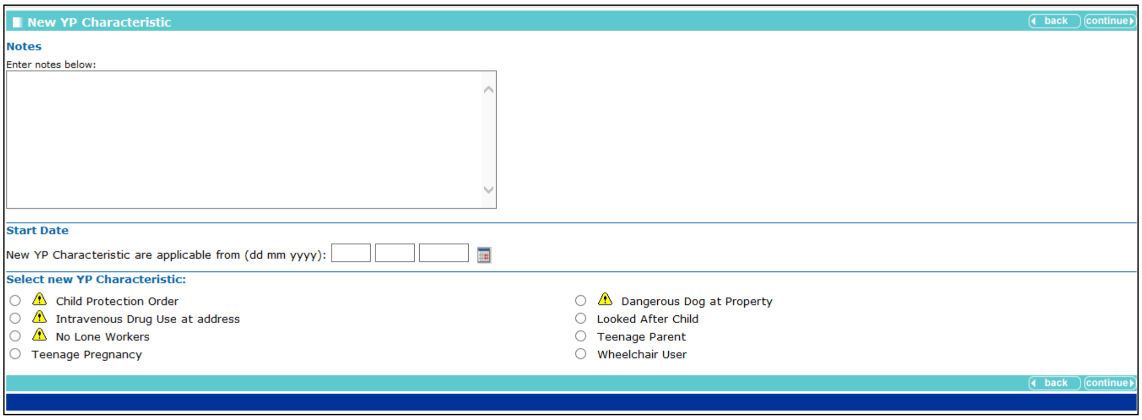
Characteristics are listed within the **YP Characteristics** panel. Until your client has any characteristics recorded, the panel header is grey and reads **No YP Characteristics**. If you require new characteristics creating to suit a particular case, contact your System Administrator. A yellow warning sign is displayed next to key characteristics. This produces an alert that is displayed at the top of the client record.



Adding New Characteristics

To add new characteristics:

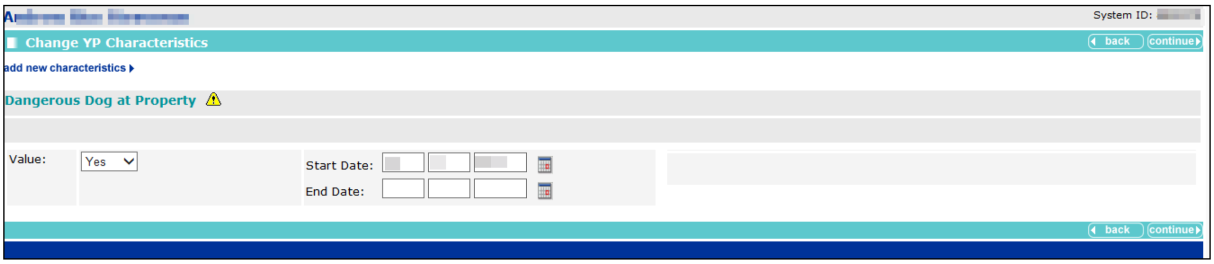
1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **YP Characteristics** panel, click the new button to display the **New YP Characteristic** screen.



3. If required, complete the **Notes** and **Start Date** fields.
4. Select the appropriate radio button for the characteristic.
5. Click the **continue** button to save the characteristic and return to the client record.

Removing a Characteristic

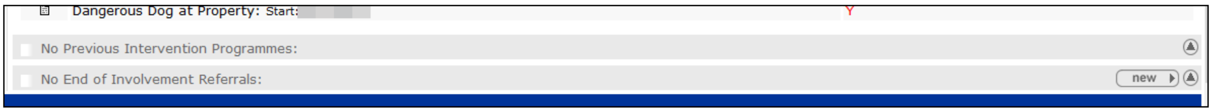
1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **YP Characteristics** panel, click the **change** button to display the **Change YP Characteristic** screen.



3. Enter the **End Date** for the required characteristic.
4. Click the **continue** button to deactivate the characteristic and return to the client record.

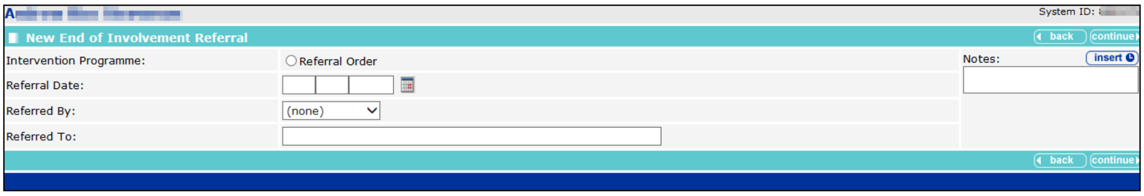
25 | End of Involvement Referrals

End of involvement referrals are listed in the **End of Involvement Referral** panel. If a client has no such referrals, the panel header is grey and reads **No End of Involvement Referrals**. Recording an end of involvement referral does not automatically message the Referred To user. It is to provide an audit trail for post-statutory external referrals.



To record an end of involvement referral:

1. Access the required client record. For more information, see [Accessing Client Records] on page *13*.
2. In the **End of Involvement Referrals** panel, click the **new** button to display the **New End of Involvement** screen.

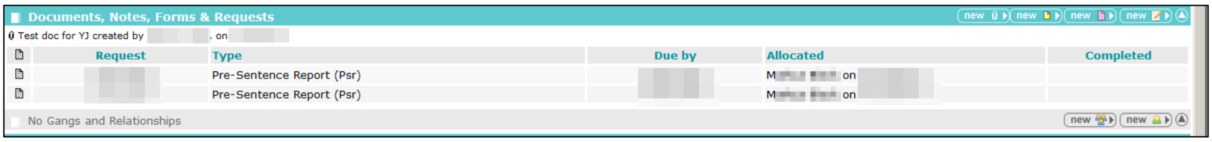


3. Complete all relevant fields.
4. Click the **continue** button to save the referral and return to the client record.

26 | Adding Documents to a Young Person's Record

Adding a New Document

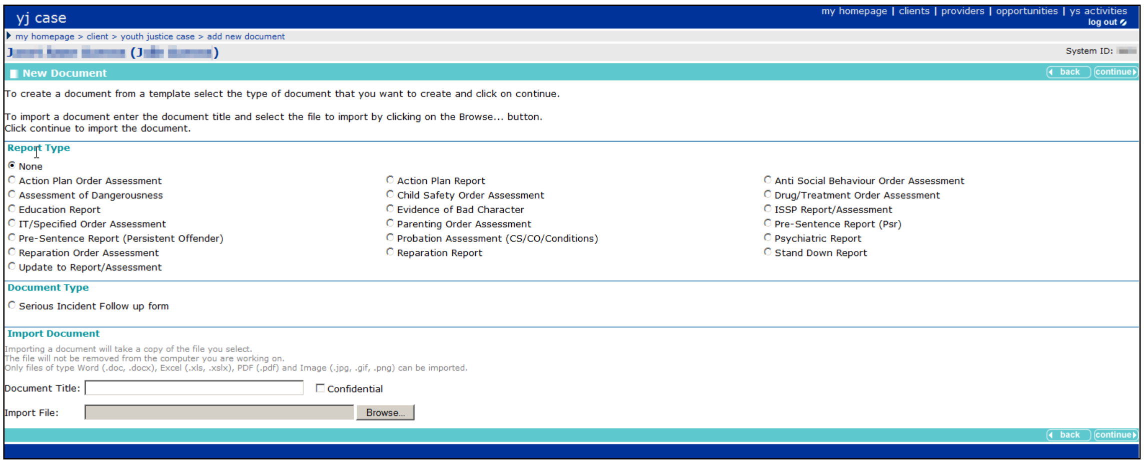
Documents are added and accessed through the **Documents, Notes, Forms & Requests** panel.



To add a new document:

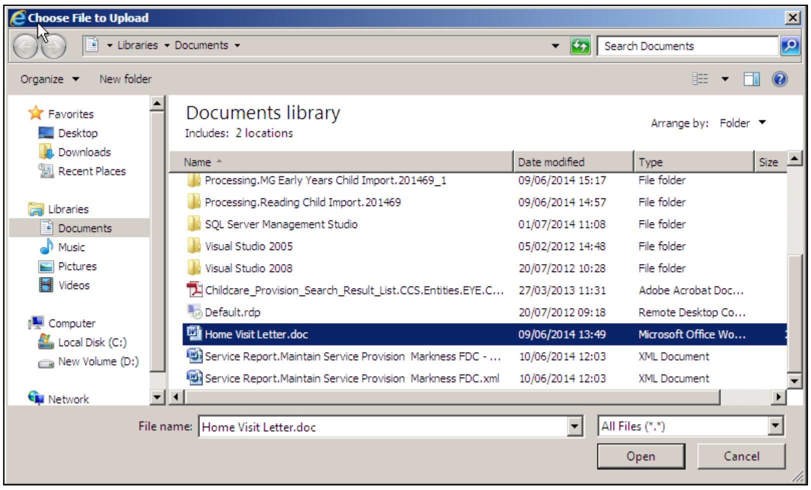
1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Documents, Notes, Forms & Requests** panel, click the **new document** button to display the **New Document** screen.

new document button



3. Select the **Report** or **Document Type**.
4. Enter a name in the **Document Title** field.
5. If required, select the **Confidential** check box.

6. Choose a file to attach:
   a. Click the **Browse** button to display the **Choose File to Upload** dialog.

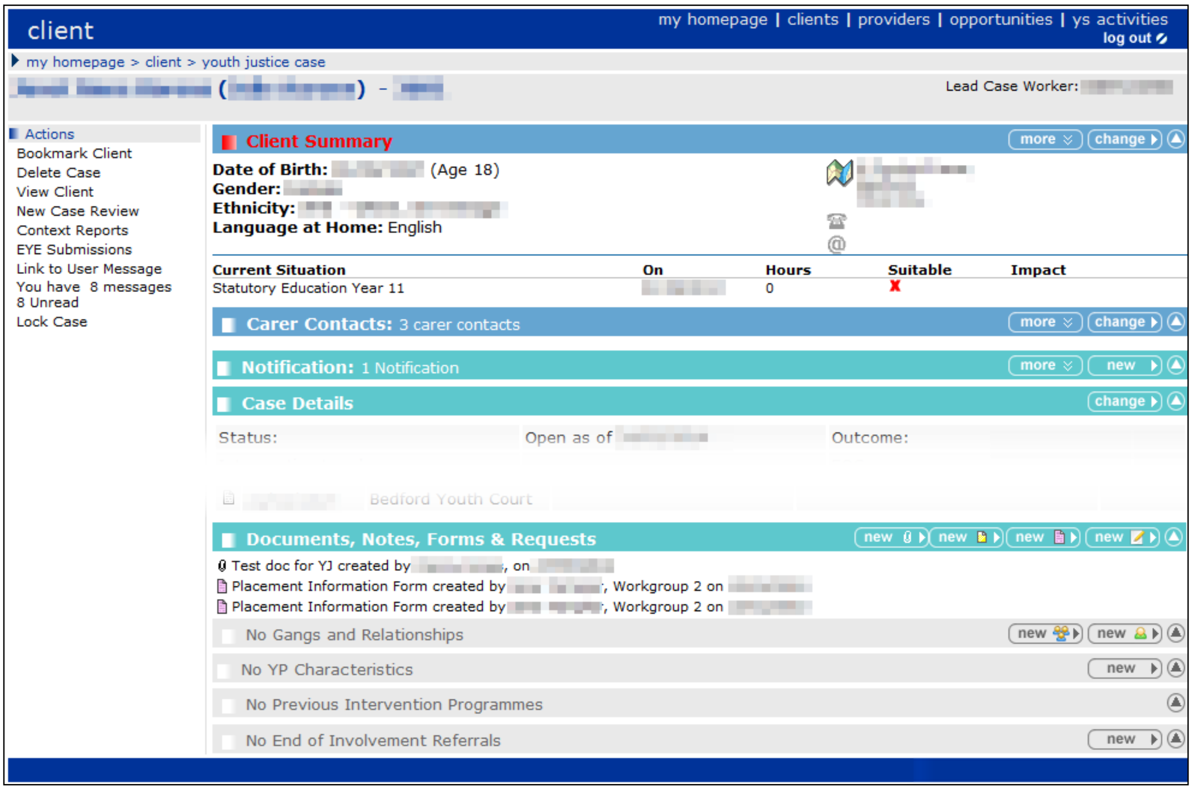


   b. Locate the required document on your computer.
   c. Double-click the document title to upload it to Youth Justice.
7. Click the **continue** button to attach the document and return to the client record.

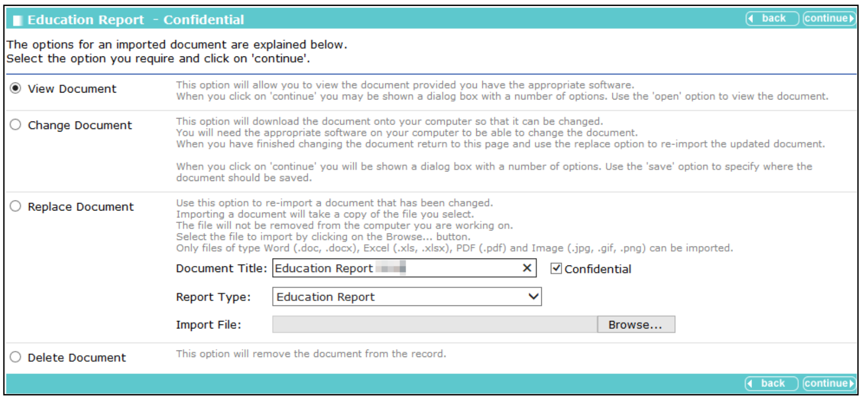
Viewing a document

To view a document:

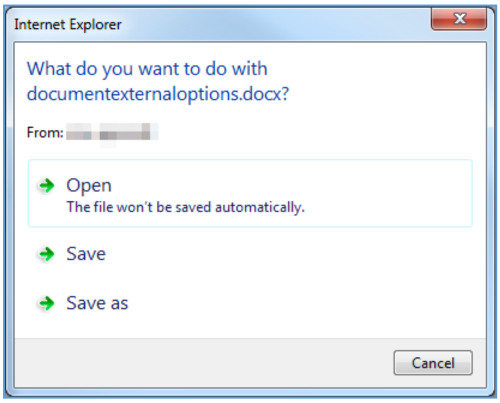
1. Access the required client record. For more information, see Accessing Client Records on page *13*.



2. In the **Documents, Notes, Forms & Requests** panel, click the name of the required document to display a panel of document actions.



3. Select the **View Document** radio button.
4. Click the **continue** button. An options dialog is displayed.



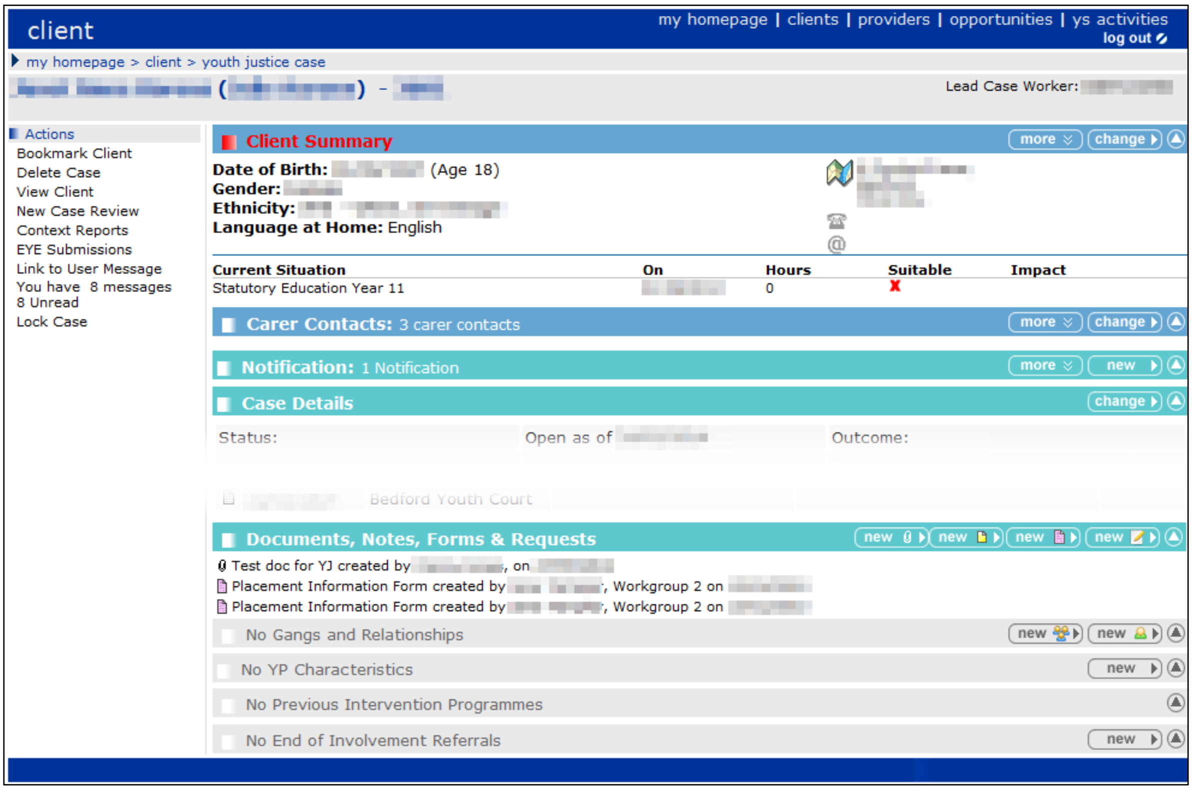
5. Click the required option:
   - **Open** displays the document without saving.
   - **Save** downloads and saves the document to your default downloads folder under the name displayed in the dialog, in this example "documentexternaloptions.docx".
   - **Save as** displays the **Save As** dialog enabling you to change the name of the document and where it is saved.

Editing a document

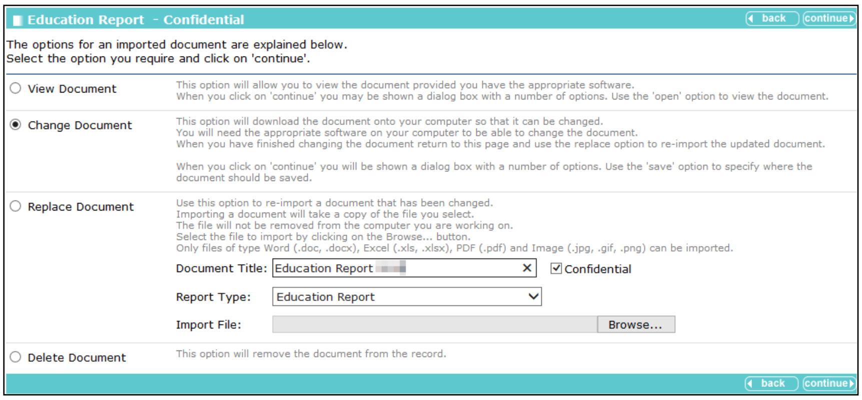
To edit a document:

NOTE: *This option is not displayed for image files.*

1. Access the required client record. For more information, see [Accessing Client Records](#) on page *13*.



2. In the **Documents, Notes, Forms & Requests** panel, click the name of the required document to display a panel of document actions.



3. Select the **Change Document** radio button.
4. Click the **continue** button. You are asked whether you want to open or save the document.

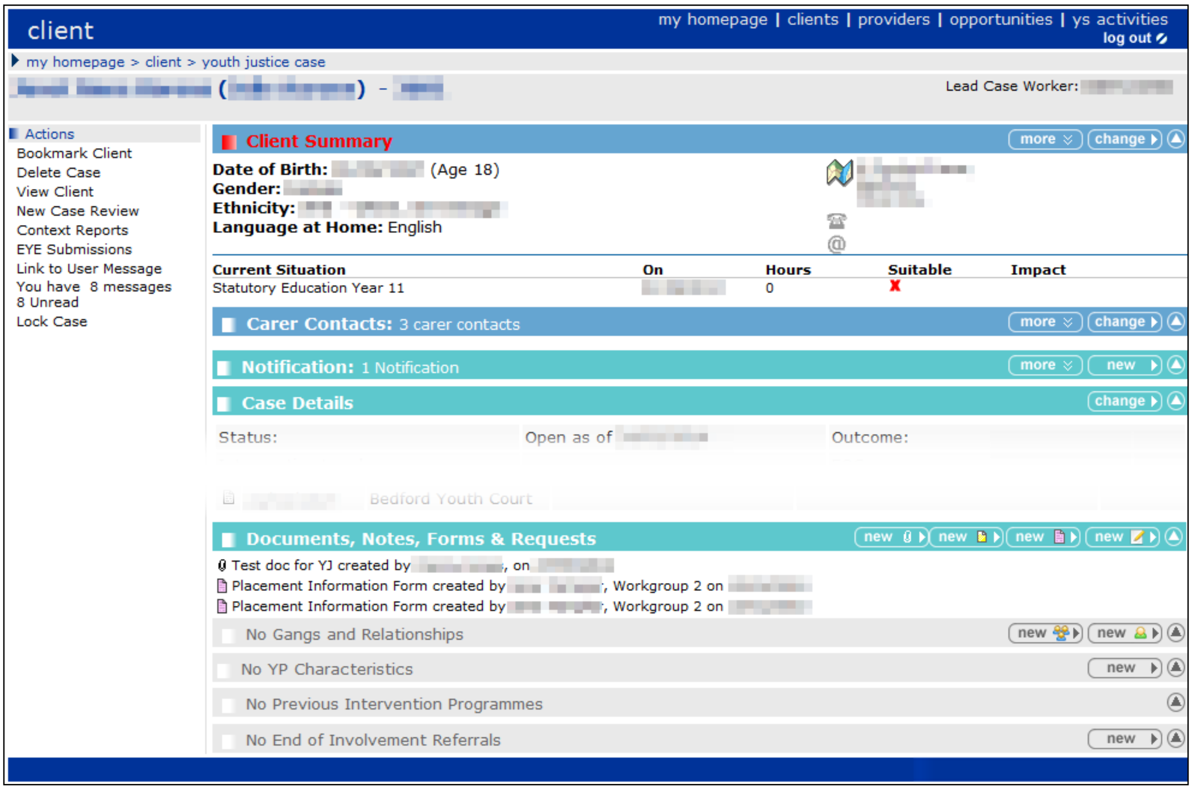
5. Click **Open**, or select an option from the **Save** menu to download the document to your computer.
6. If the document does not open automatically, locate it on your machine and open it manually.

7. Make the necessary changes to the document and save it.
8. Re-upload the document to the system using the **Replace Document** function. For more information, see *Replacing a document* on page *123*.

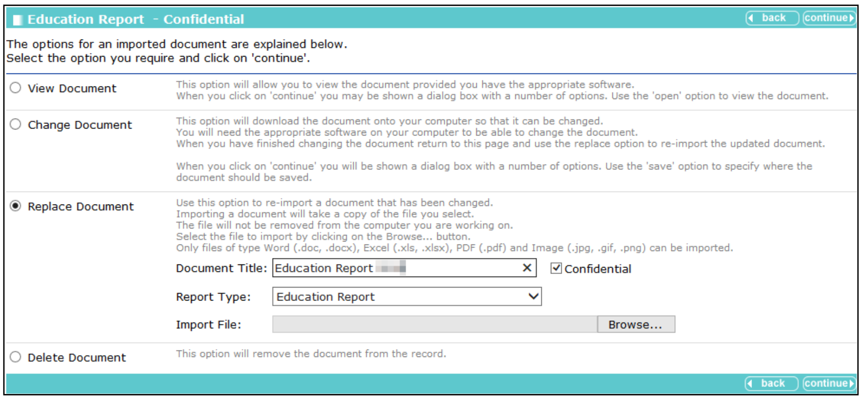
Replacing a document

To replace a document:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.



2. In the **Documents, Notes, Forms & Requests** panel, click the name of the required document to display a panel of document actions.



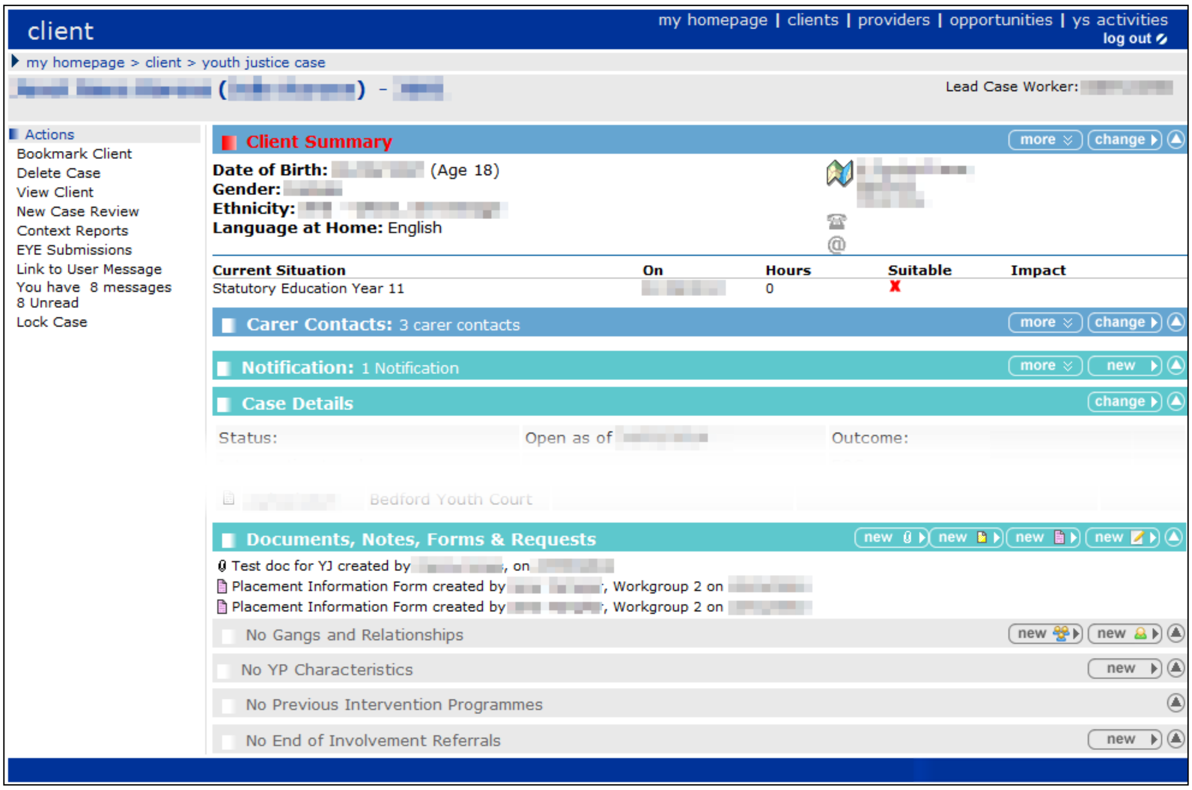
3. Select the **Replace Document** radio button.
4. If required, amend the **Document Title**.
5. If required, select or deselect the **Confidential** check box.
6. Select the **Report Type**.

7. Click the **Browse** button to display the **Choose File to Upload** dialog.
8. Locate the new document on your computer.
9. Double-click the document title to upload it to Youth Justice.
10. Click the **continue** button to complete the process.

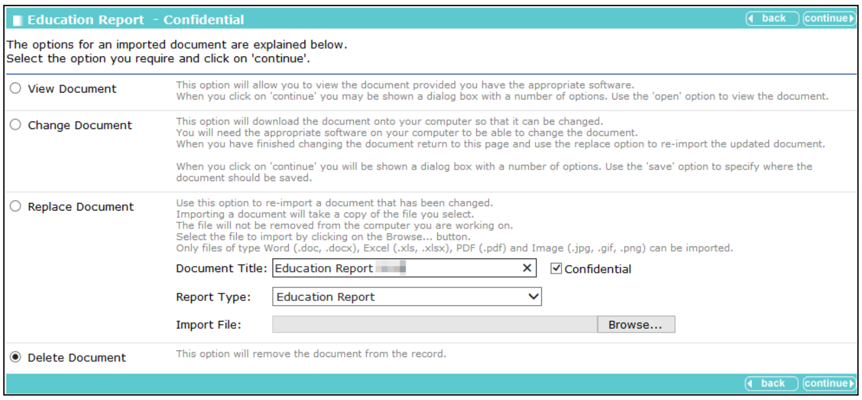
Deleting a document

To delete a document:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.

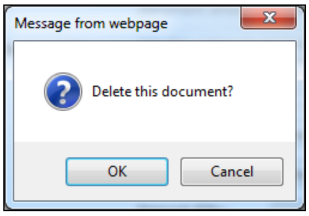


2. In the **Documents, Notes, Forms & Requests** panel, click the name of the required document to display a panel of document actions.



3. Select the **Delete Document** radio button.

4. Click the **continue** button. A warning dialog is displayed.



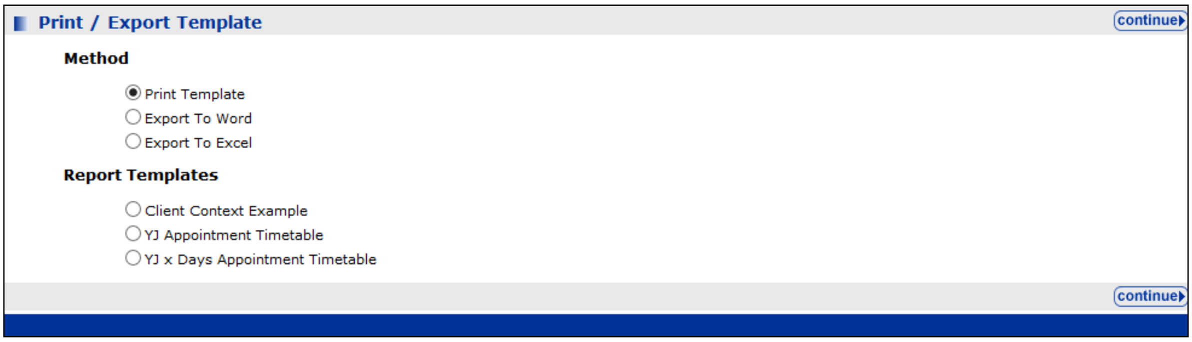
5. Click the **OK** button. The document is deleted and you are returned to the client record.

27 | Appointment Timetables

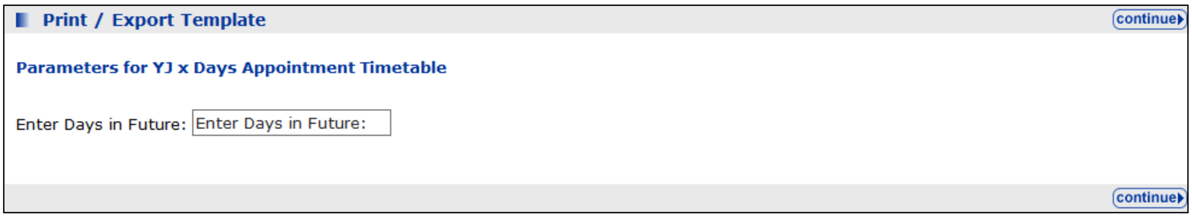
You can print or export a timetable of appointments you have with a certain client. These reports can list all future appointments, or for a user-determined period of time.

To create an appointment timetable:

1. Access the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **Actions** menu, click the **Context Reports** hyperlink to display the **Print / Export Template** screen.



3. In the **Method** list, select the radio button for the desired template output.
4. To create a timetable of all future appointments, in the **Report Templates** list select the YJ **Appointment Timetable**.
5. To create a timetable for a specified number of days in the future:
   a. Select the **YJ x Days Appointment Timetable** radio button.
   b. Click the **continue** button to display a parameters screen.



   c. Enter the number of days for which you want to display the appointments in the **Enter Days in Future** field.
6. Click the **continue** button to process the report.

   If you selected the **Print Template** option, a .pdf document opens in the web browser. You can choose to save it to your computer or print it straight from the web browser.

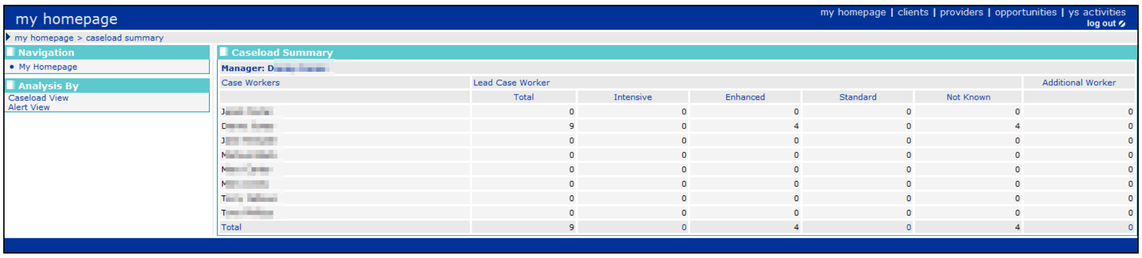
   If you selected the **Export to Word** or **Export to Excel** radio buttons, you are presented with the option to open the file without saving it, or to save it to your computer.

28 | YJ Case Manager Tool

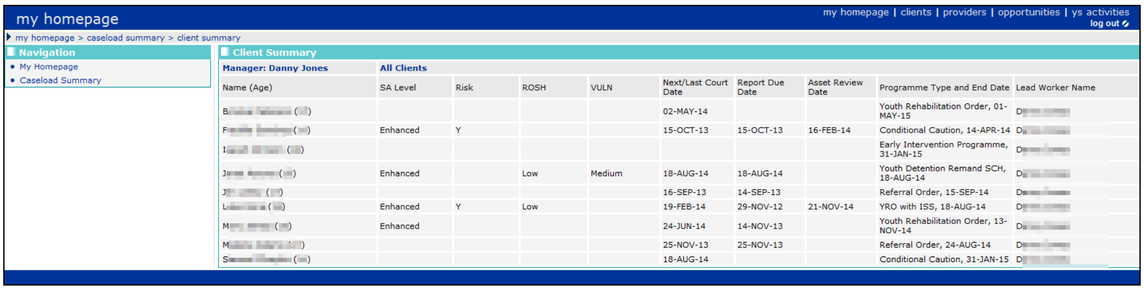
The **YJ Case Manager Tool** allows a user to view their caseload organised by scale or by alerts. It also enables managers to view their workers' caseloads.

To view caseload:

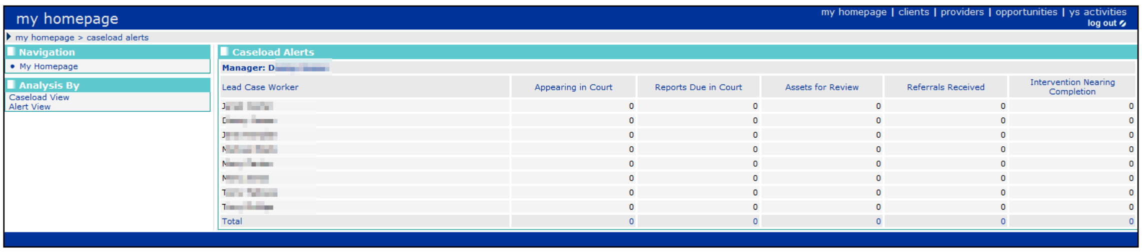
1. Log into **my homepage**.
2. In the **IYSS Links** panel, click the **YJ Case Manager Tool** to display the **Caseload Summary** screen by caseload view.



3. To display a breakdown of the caseload, click the number in the **Total** column to display a summary of all cases.



4. To display the caseload in terms of alerts, in the **Analysis By** panel, click the **Alert View** hyperlink to display the **Caseload Alerts** panel.



29 | Submitting an AssetPlus stage to the YJB

Submitting an AssetPlus stage overview

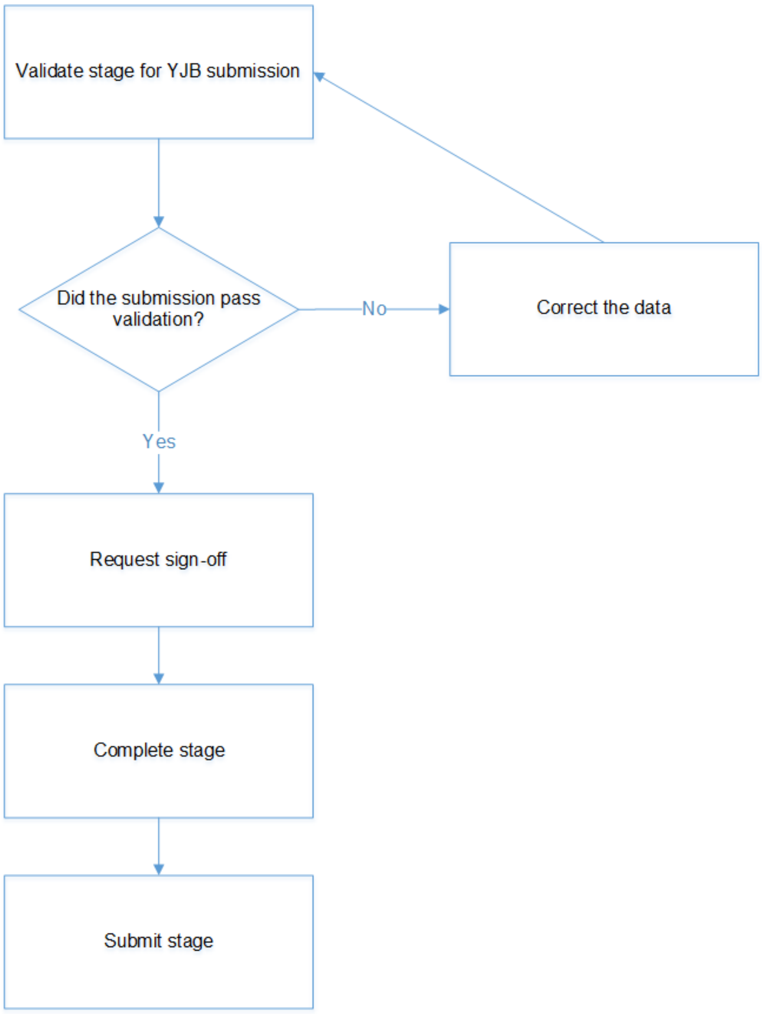
WARNING!: *Before using this facility, you <u>must</u> run a series of test submissions. Further guidance from Capita and the YJB on the testing process will be issued. Do <u>not</u> attempt to submit a stage to the YJB until after you complete the test submission process.*

The Youth Justice Application Framework (YJAF) enables you to transfer AssetPlus stages to the YJB placements team for young people who have been remanded or sentenced to custody.

You can transfer four types of AssetPlus stages:

- Bail recommendations
- Placement notifications
- Post court report
- Pre-sentence report (All options).

To transfer an AssetPlus stage to the YJB placements team, you must complete the following steps:



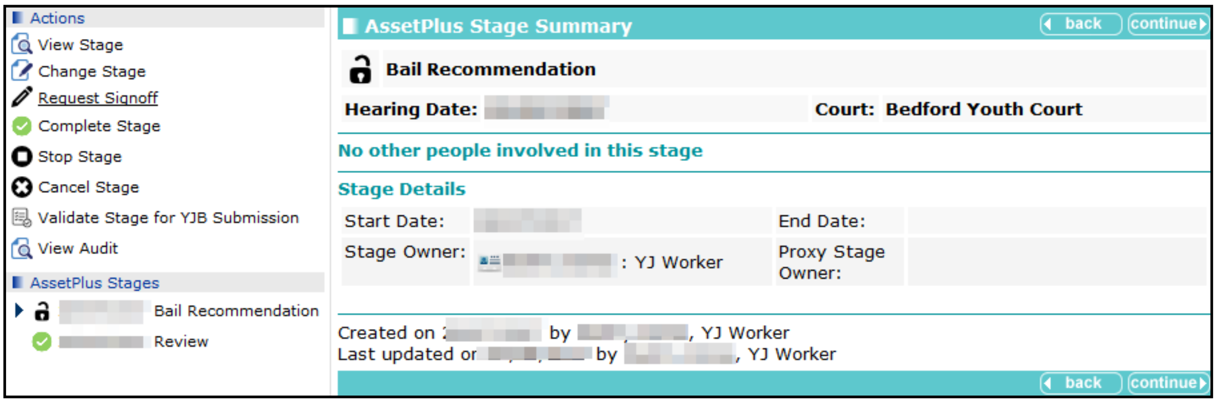
The YJB submission process is only available for clients with a completed AssetPlus stage, and is only displayed to users who have the 'YJ - YJB Submission' permission assigned.

Validating a stage for YJB submission

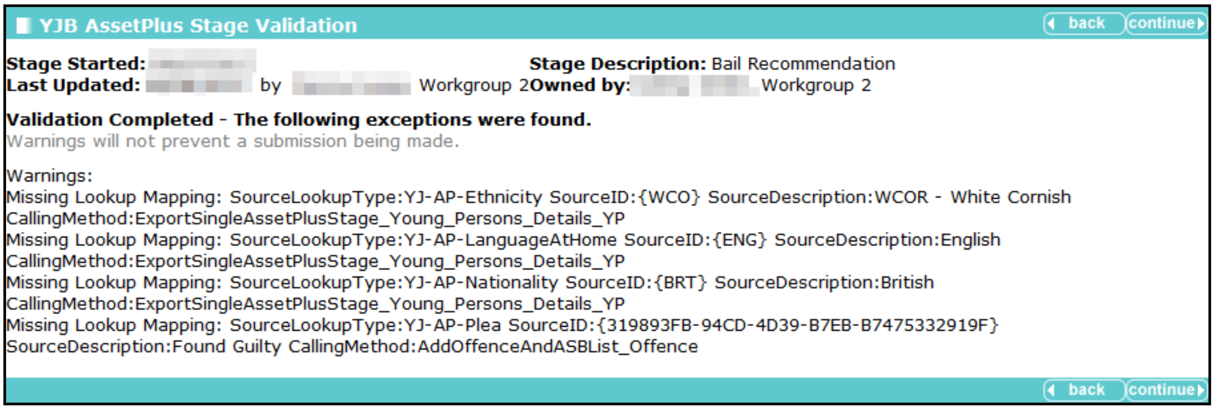
You can check the validity of AssetPlus stages prior to submitting them to the YJB. Validating a stage enables you to address any data issues before submitting. Although you can validate the data in a stage at any time, you cannot submit a stage to the YJB until the stage has been completed.

To validate a stage for YJB submission:

1. Open the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



3. In the **Actions** menu, click the **Validate Stage for YJB Submission** hyperlink to display the **YJB AssetPlus Stage Validation** screen. The validation runs automatically.



If you receive any warnings, you can still send the YJB submission. If you want to identify the AssetPlus field to which the errors relate so that you can correct them, refer to the *One YJ Asset to AssetPlus Mapping Guide*, available on the One Publications website (http://www.onepublications.com).

4. Click the **continue** button to return to the **AssetPlus Stage Summary** page.

Requesting signoff and completing a stage

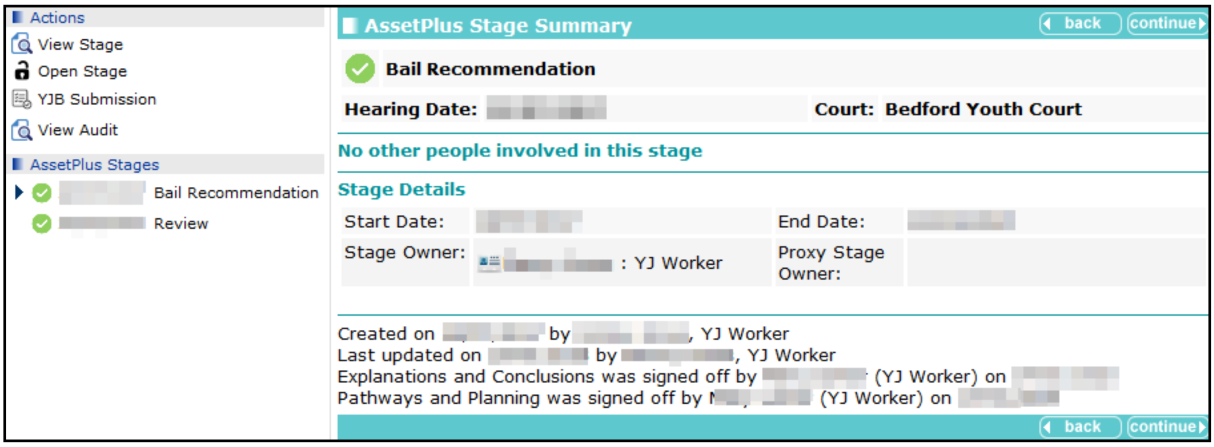
Before submitting a stage to the YJB, it must first be signed off by your manager and then completed by you. These are standard AssetPlus processes and not specific to submitting a stage to the YJB.

More Information:
Signing Off an AssetPlus Stage on page *68*
Completing an AssetPlus Stage on page *70*

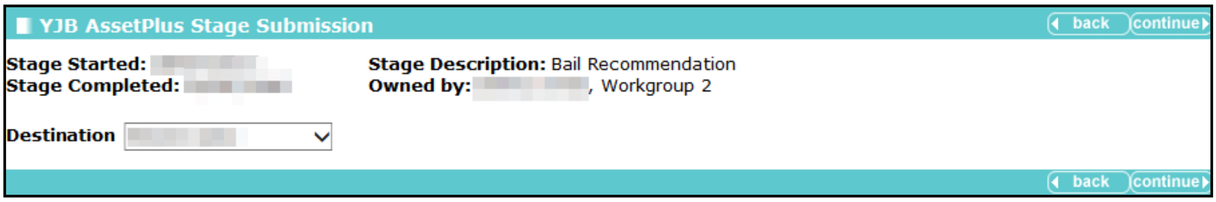
Submitting a stage to the YJB

After the AssetPlus stage has been signed off and completed, you can submit it to the YJB.

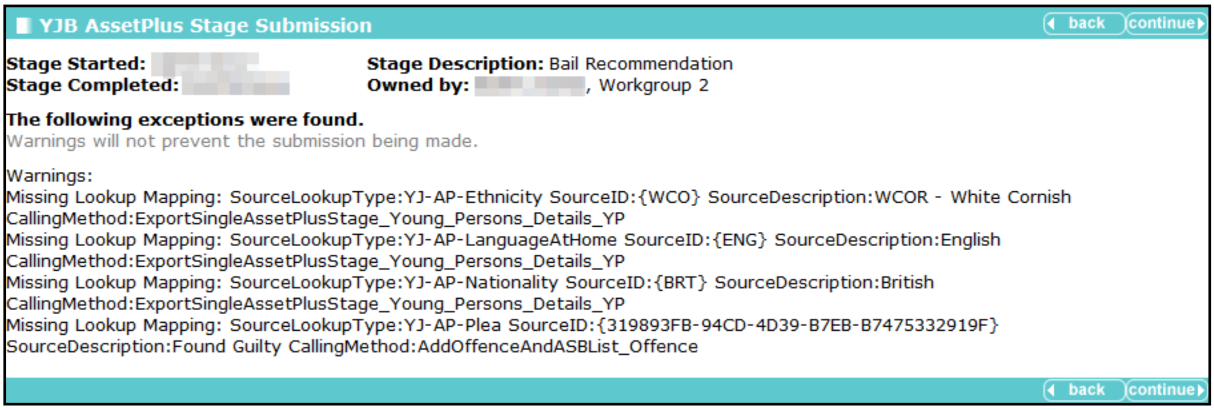
1. Open the required client record. For more information, see Accessing Client Records on page *13*.
2. In the **AssetPlus** panel, click the **Stage Name** of the required AssetPlus stage to display the **AssetPlus Stage Summary** screen.



3. Click the **YJB Submission** hyperlink to display the **YJB AssetPlus Stage Submission** page.



4. Select the required **Destination**.
5. Click the **continue** button to display the submission details.



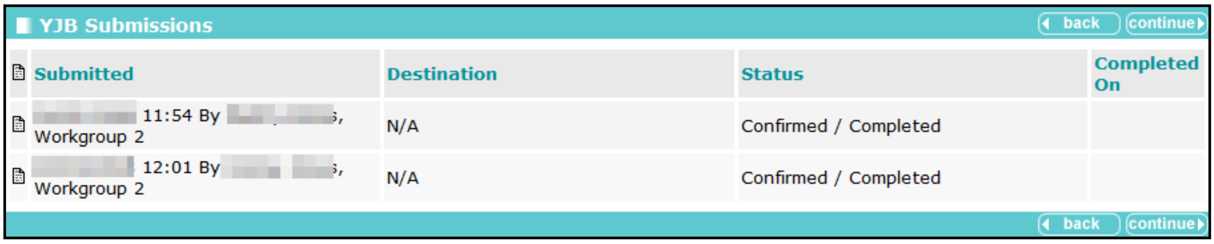
If you receive any warnings, you can still send the YJB submission. If you want to identify the AssetPlus field to which the errors relate so that you can correct them, refer to the *One YJ Asset to AssetPlus Mapping Guide*, available on the One Publications website (http://www.onepublications.com).

Click the **continue** button to finish the submission and return to the **AssetPlus Stage Summary** screen.

Reviewing YJB submissions

To review the details of submitted AssetPlus stage submissions:

1. Open the required client record. For more information, see [Accessing Client Records](#) on page *13*.
2. In the **Actions** menu, click the **Placement History** hyperlink to display the **YJB Submissions** page.



3. Click the **continue** button to return to the client record.

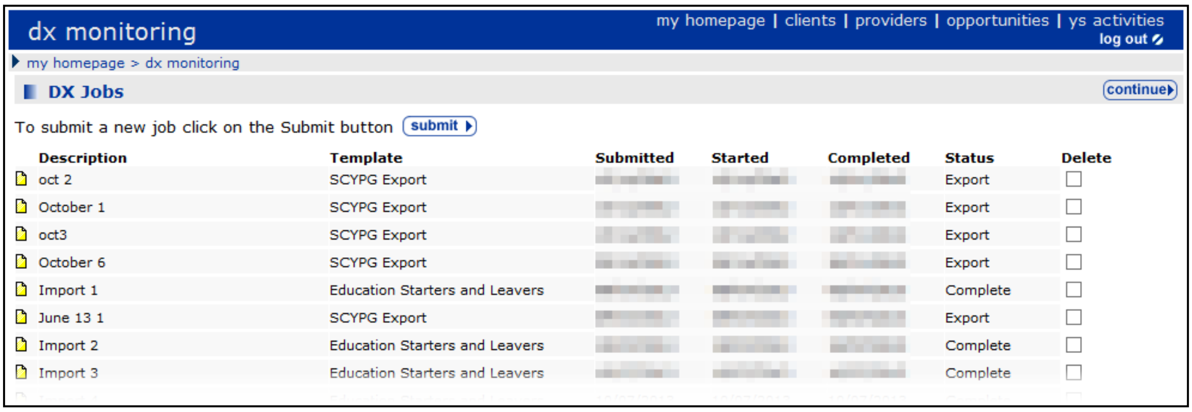
30 | Submitting YJMIS Returns

Submitting a YJMIS Export Job

YJMIS export jobs are submitted through the One IYSS web application.

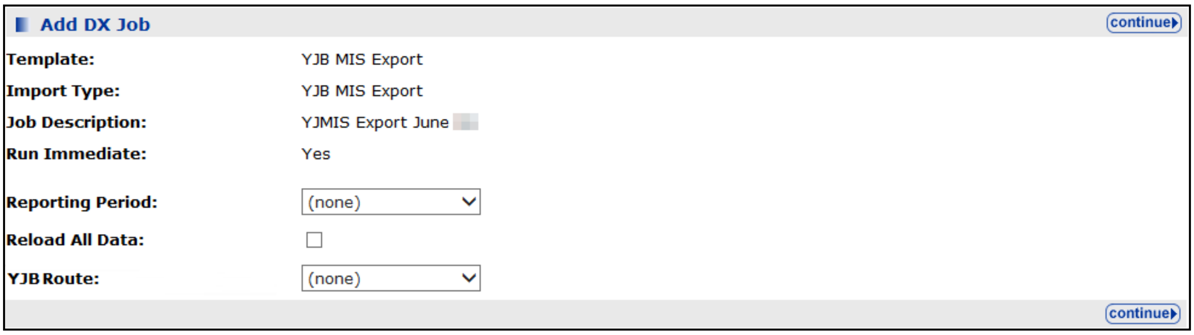
To submit a new YJMIS export job:

1. In the **IYSS Links** panel in **my homepage**, click the **DX Monitoring** hyperlink to display the **DX Jobs** screen.



2. Click the **submit** button to display the **Add DX Job** screen.

3. Select the **YJB MIS Export** radio button.
4. Enter a name for the export in the **Description** field.
5. In the **Run Immediate** field:
   - To run the export when the next DX Scheduled Job runs, select the **Yes** radio button.
   - To run the export at the time specified in the 'DX Start Time' system value (**System Administration | System | System Value**), select the **No** radio button.
6. Click the **continue** button to display the next screen.



Add DX Job continue

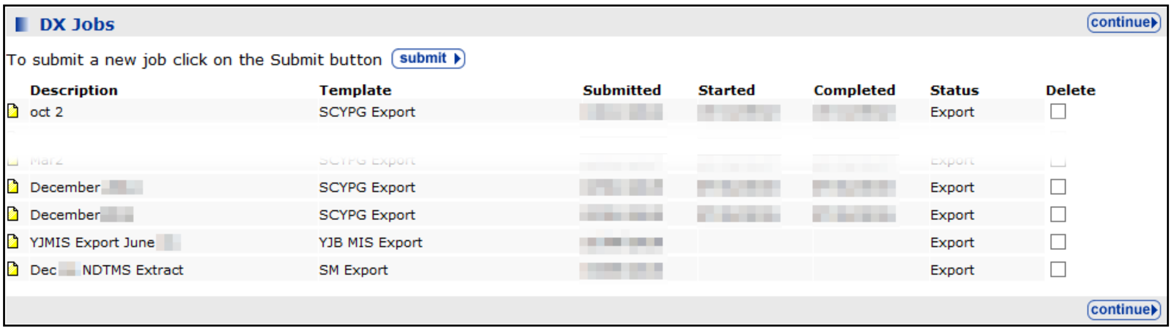
Template:	YJB MIS Export
Import Type:	YJB MIS Export
Job Description:	YJMIS Export June
Run Immediate:	Yes
Reporting Period:	(none)
Reload All Data:	☐
YJB Route:	(none)

continue

7. Select the **Reporting Period** from the drop-down.
8. If required, select the **Reload All Data** check box. If data is not reloaded, the export file includes cases that were closed within the selected time period as well as the active cases.
9. If you are using Connectivity, select the **YJB Route** from the drop-down.

> ***NOTE:*** *The* ***YJB Route*** *field is not displayed if you are not using Connectivity.*

10. Click the **continue** button to submit the job and return to the **DX Jobs** screen. The job is added to the **DX Jobs** table. Progress is displayed in the **Started** and **Completed** columns.



DX Jobs continue

To submit a new job click on the Submit button submit

Description	Template	Submitted	Started	Completed	Status	Delete
oct 2	SCYPG Export				Export	☐
Mar2	SCYPG Export				Export	☐
December	SCYPG Export				Export	☐
December	SCYPG Export				Export	☐
YJMIS Export June	YJB MIS Export				Export	☐
Dec NDTMS Extract	SM Export				Export	☐

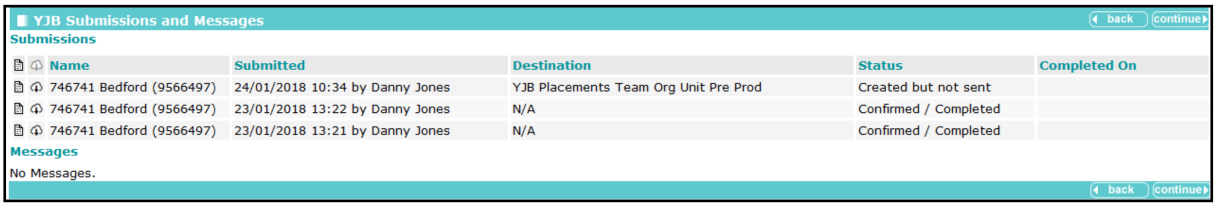
continue

Downloading the YJMIS Return

YJMIS returns can be downloaded from the One IYSS web application after they have been validated and produced.

To download a YJMIS export file:

1. In the **IYSS Links** panel of **my homepage**, click the **YJB Submissions** hyperlink to display the **YJB Submissions and Messages** screen.



YJB Submissions and Messages back continue

Submissions

Name	Submitted	Destination	Status	Completed On
746741 Bedford (9566497)	24/01/2018 10:34 by Danny Jones	YJB Placements Team Org Unit Pre Prod	Created but not sent	
746741 Bedford (9566497)	23/01/2018 13:22 by Danny Jones	N/A	Confirmed / Completed	
746741 Bedford (9566497)	23/01/2018 13:21 by Danny Jones	N/A	Confirmed / Completed	

Messages

No Messages.

back continue

2. Click the download icon next to the required export to save or open the YJMIS XML file.

31 | Appendix A: Offences and Episodes

Criteria for Outstanding, Current and Historic Offences

Outstanding offences cannot be selected for inclusion within episodes. The criteria for outstanding offences are:

- No plea of Guilty, Found Guilty or Offence Admitted for the offence in any court appearance.
- No outcome recorded against the offence.

Current offences can be selected for inclusion in new episodes or added to existing episodes. Current offences are:

- Offences with a plea of Guilty, Found Guilty or Offence Admitted, <u>and</u> with no offence outcome.

  Or
- Offences that have a substantive outcome but have no linked intervention programme and have not been included in an episode within a completed AssetPlus stage. An offence can have figured in a previously completed stage as current, provided it was not included in an episode in that stage.

  Or
- Offences that have a substantive outcome and have a current intervention programme, using the current data and intervention programme start and end dates to define it as current or not.

Historical offences are offences that have previously been included in an episode in a completed AssetPlus stage and have either:

- A substantive outcome and no linked intervention programme.

  Or
- A substantive outcome linked to a previous intervention programme, using the current data and Intervention Programme start and end dates to define it as previous or not.

Episodes and Stage Pre-population

Episodes are created and maintained using offences from the **Current Offences** list. A current offence in an episode of a stage currently in progress remains in the episode for the entire duration of the stage, even if the offence becomes historic while the stage is in progress. The offence is only recorded as historic after the stage has been stopped or completed.

Offences linked to episodes are copied forward from stopped or completed stages to new stages based on the following criteria:

- Episodes with current offences: Current offences are brought forward into the new episode, historical offences are moved into the history. The free text fields corresponding to the episodes are automatically populated forward regardless of whether or not any of the episode's offences remain current.
- Episodes with historical offences only: The episode is not brought forward to the new stage, and all offences are moved to the new stage's offence history. Free text fields relating to the episodes are not populated forwards.

32 | Appendix B: ASB Incidents and Episodes

Criteria for Current and Historic ASB Incidents

Current ASB incidents are any ASB incident where the **Historic** check box is deselected. They can be selected for inclusion in new episodes or added to existing episodes. They also include any incidents that have become historic during the stage currently in progress, however these incidents are only recorded as historic when the stage is stopped or completed.

ASB incidents can be marked as historic by selecting the **Historic** check box in the **ASB Incident Change** screen within a YJ case. This check box is only available if the incident has been included in an episode within a completed AssetPlus stage, and not just if it has been included in the actual stage.

ASB incidents only become historic in AssetPlus when:

- The **Historic** check box has been selected.
- They have been included in an episode in a previously completed AssetPlus stage, unless they are included in an episode in a currently open stage.

Episodes and Stage Pre-population

Episodes are created, edited and maintained from the **Current ASB Incidents** list. A current ASB incident that is included in an episode in a stage currently in progress remains in the episode for the entire duration of the stage, even if it becomes historic while the stage is in progress. The incident is only recorded as historic when the stage is stopped or completed.

ASB incidents included in episodes in stages that have been stopped or completed are populated forward into new stages based on the following criteria:

- Episodes with current ASB incidents: Current incidents are brought forward into the new episode, historical incidents are moved into the history. The free text fields corresponding to the episodes are automatically populated forward regardless of whether or not any of the episode's incidents remain current.
- Episodes with historical ASB incidents only: The episode is not brought forward to the new stage, and all incidents are moved to the new stage's ASB incident history. Free text fields relating to the episodes are not populated forwards.

33 | Appendix C: Additional AssetPlus Modules

Modules in AssetPlus are displayed in blue in the stage section panel in AssetPlus stages.

All case stages include the following sections and modules:

Sections	Modules
Core Record	Referrals
Offending and Anti Social Behaviour	Restorative Justice
Personal Family and Social Factors	
Foundations for Change	
Self Assessment	

Case stages also include additional modules as follows:

Case Stage	Modules
Bail Recommendation	Bail and Remand Custody
Entering into Custody	Custody
Placement Notification	Custody
Post Court Report	Custody
Pre Sentence Report (All Options)	Pre Sentence Report Custody
Pre Sentence Report	Pre Sentence Report
Pre-Release from Custody	Leaving Custody
Referral Order Report	Referral Order Panel Report
Referral in (OOCD)	
Referral in (Prevention)	
Review	Referral Order Panel Report (if Disposal is ROR)

Case Stage	Modules
Sentenced (no report)	
Transfer YOT to YOT	YOT to YOT
Transfer to Probation	Youth to Adult Services
Case Closure	Referral Order Panel Report (if Disposal is ROR)

Modules contain the following subsections:

Module	Subsections
Bail and Remand	Young person's details Parents/carers' / Significant adults details Court and alleged offence details Objections to Bail YOT details Contact with Services Accommodation for Bail Personal Circumstances Health Safety and Wellbeing Risk to others MAPPA Community Package Proposal Court Outcome Stage Owner details
Custody	Young person's details Parents/carers' details YOT details Contact with Services Court and Alleged Offence details Secure Estate History Placement Recommendation Health Personal Circumstances Safety and wellbeing Future Behaviour Post Court Arrival in Custody Stage Owner details

Module	Subsections
Leaving Custody	Young person's details Parents/carers' details Notice of Supervision / Licence Release arrangements
Referrals	Young person's details Parents/carers' details Referral details
Restorative Justice	Young person's details Parents/carers' details Key areas of Intervention Offending and Anti-Social Behaviour (or Anti-Social Behaviour if Prevention only) Young Persons views Tailoring Interventions
Pre Sentence Report	Front screen Sources of information Offence Analysis Assessment of the young person Assessment of the need for parenting support Assessment of the risk to the community Conclusion and proposal for sentencing Assessment of Dangerousness
Referral Order Panel Report	Front screen Sources of information Offence Analysis Assessment of the young person Assessment of the risk to the community Introduction Elements of contract and progress Conclusion
YOT to Adult Services	
YOT to YOT Transfer	

Index