

CAPITA



CSS Changes in Terminology

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Technical Guide



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01 / Changes in Terminology between CSS and SEN v3 and v4

Introduction

This document is aimed at One Co-ordinators, One Support Teams and CSS and SEN users to provide an overview of the key changes in terminology from v3 to v4.

General

General changes in terminology between v3 and v4 related to CSS and SEN.

v3	v4
CSS Support Service	Service Team – maintained via Services CSS Service Teams Administration . Members of the Service Team are defined via the linked 'Establishment' (which means team) – this is set up via Tools Team Structure . SEN is migrated as a separate Service Team.
CSS Referrals	Involvements (based on Involvement Form of type Generic CSS Involvement)
SEN Assessments	SEN Assessment Involvements
SEN Standalone Reviews	SEN Standalone Review Involvements
SEN Statement Reviews	SEN Statement Review Involvements
SEN Tribunals	SEN Tribunal Involvements
Contact Log	Communication Log
Contact Log – Meetings	Activities (see Activities section)
Actions Focus – Actions	Home Page 'My Workflow Messages'
Caseworker focus – ability to select a Caseworker and see their outstanding Referrals and School Support visits	Services CSS Service Teams Workload – members of a Service Team will be able to see all Involvements and Activities associated with members of that Service Team.

Service Teams

In v4 Service Teams are defined via **Services | CSS Service Teams Administration**.

v3 Support Services	v4 Service Teams
Short Name	There is no need for an equivalent in v4.
Service Name	Services CSS Service Teams Administration CSS Service Teams Definition Service Team Name

v3 Support Services	v4 Service Teams
Role Code for Caseworker / Administrative Officer	<p>In v4, instead of looking at Roles in order to establish which Caseworkers can be selected for an Involvement, the system provides greater flexibility in selecting people who may hold a variety of positions. It does this by requiring that the Caseworker is a member of the Service Team's Establishment Team Structure with a Post where the 'Is CSS Caseworker?' flag is ticked. (This is defined via Tools Team Structure).</p> <p>Involvement Administration Officers are selected from the Service Team's Establishment Team Structure where the 'Is CSS Admin Officer?' is ticked.</p> <p>Other SEN Professionals associated with SEN Assessment Involvements are still selected from a list of people with the appropriate Role Code associated with them via v3 Module Admin Manage Roles.</p>
Label for Caseworker	<p>Services CSS Involvement Forms Involvement Form Caseworker Label</p> <p>In v4 the label for the Caseworker is now stored for each Involvement Form, rather than each Service Team in order to support Multi-Agency Teams better. Involvement Forms are defined via Services CSS Involvement Forms.</p>
Shared Service	<p>No direct equivalent in v3. Instead Access Control Lists are used to determine which users, groups of users, service teams and posts can access either a service team's records or specific records.</p>
Referrals Confidential	<p>Services CSS Service Teams Administration CSS Service Teams Definition Exclude Involvements from CSS/SEN Summary Reports by Default. This flag is used to automatically set the Involvement Form's 'Exclude from CSS Summary Report' flag. See notes in Involvements section about Referral Confidential.</p>
Show Visual Impairment/Show Hearing Impairment	<p>Visual Impairment and Hearing Impairment specific information in v3 is not being migrated at this time. This is planned for migration in 2010.</p>
Service Visit Parameters – Time Elements (Applicable/Mandatory)	<p>Services CSS Service Teams Administration CSS Service Teams Definition Activity Time Categories.</p> <p>In addition to the categories that could be used in v3, it is now also possible to define additional time categories.</p>
Service User Codes – Referral Reason, Referral Source, Referral Outcome	<p>Now stored at the Involvement Form level rather than the Service Team to better support multi-agency team working.</p> <p>Services CSS Involvement Forms Involvement Form Details – Reasons, Sources, Outcomes. Also Statuses are now also stored at the Involvement Form level.</p>

v3 Support Services	v4 Service Teams
Service User Codes – Support Type, Target Group, Focus, Student Support Detail, Contact Log Category	Services CSS Service Teams Administration CSS Service Teams Definition – Activity Types, Activity Target Groups, Activity Focuses, Activity Support Types, Communication Categories

Involvements

Change of terminology between v3 Referrals and v4 Involvements.

v3 Involvements	v4 Involvements
<p>Student</p> <p>In v3 only one student could be the subject of the referral</p>	<p>Subjects</p> <p>One or more people can be the subject of a CSS Involvement (e.g. this could be used to represent an involvement with a family group or a small group of children at a school with a similar need). SEN Involvements have one subject.</p>
	<p>Description</p> <p>No equivalent in v3. This is used to identify the Involvement in Involvement Summary lists where there is more than one subject.</p>
	<p>Involvement Form</p> <p>No equivalent in v3. This is the involvement form template upon which the individual involvement is based. These are set up in Services CSS Involvement Forms. These are selected from one of several involvement form types and specific User Defined Fields can be associated with the specific Involvement Form.</p> <p>A Service Team can use one or more Involvement Forms. An Involvement Form can be shared across multiple Service Teams.</p>
Caseworker / Administration Officer	See notes on Role Code for Caseworker in Service Teams section above.
Referral Confidential / Date / Reason	<p>Exclude from CSS Summary Report / Exclude Date / Exclude Reason</p> <p>In v4 in order to control access to Involvements, the Set ACL button should be used to set an 'Access Control List' of specific users, groups of users, service teams or posts who can read/write this record. A default Access Control List can be set for all of the Service Team's records via Services CSS Service Teams Administration. If a specific Involvement requires different access control then this may be set at the individual involvement level.</p> <p>Therefore the v3 'Referrals Confidential' flag does not work in the same way in v4. This information has been migrated to the v4 'Exclude from CSS Summary' flag. If this is ticked then the involvement will not be displayed on the Student Details Links report 'CSS Summary' for any user.</p>

Communication Log

Change of terminology between v3 Contact Log and v4 Communication Log.

v3 Contact Log	v4 Communication Log
Contact Log linked to Referral / SEN Assessment	Communication Log is accessed from Involvements. In addition, it is also possible to link Communications directly to the Person or Student without recording an Involvement by using the Communications menu link direct from the Person Details or Student Details screen.
Meetings	In v4 meetings are stored as Activities rather than within the Communication Log – see Activities section
Contact Type: Information	Communication Type: Other
Security – Extremely Confidential/Confidential/Summary Shared/ Shared	<p>In v4 in order to control access to Communications, the Set ACL button should be used to set an 'Access Control List' of specific users, groups of users, service teams or posts who can read/write this record. A default Access Control List can be set for all of the Service Team's records via Services CSS Service Teams Administration. If a specific Communication requires different access control then this may be set at the individual communication level.</p> <p>The effect of the v3 Security setting will not be migrated. Access Control Lists will need to be set manually at the Service Team or individual communication level.</p>

Timelines

Change of terminology between v3 Timelines and v4 Timelines.

v3 Timelines	v4 Timelines Or Workflow
Event	<p>(Single) Activity</p> <p>Note: There are two types of Activities in CSS v4:</p> <p>For Activities accessed from the Activities menu link (which replace v3 School Support records) these will be referred to here as CSS Activities.</p> <p>Within Timelines there are now Workflow Activities that replace v3 Events.</p>
Step	<p>Sequence Activity:</p> <p>A group of Activities that must be completed in order, before the Workflow moves on.</p> <p>OR</p> <p>Parallel Activity:</p> <p>A Group of Activities that may be completed in any order, before the Workflow moves on (must all be completed though).</p>

v3 Timelines	v4 Timelines Or Workflow
Branched Timeline	<p>No need for separate Branched Timelines as branches can be accommodated in one Workflow.</p> <p>Branches on a workflow (i.e. different routes that could be taken through the workflow) will always be preceded by a Decision Activity, the outcome of this decision will determine the branch that will be followed.</p> <p>Capita is planning to provide the facility to link one Timeline to another Timeline, but this facility is not yet available in v4.</p>
Warning Days	No change in terminology
Target Days	No change in terminology
Step Limits	<p>Group Limits; can be applied to a Parallel Activity or a Sequence Activity, both of these are groups of activities.</p> <p>Limits aren't applicable to single activities.</p>
Timeline linked to referral	Timeline linked to an involvement

Provision

Change of terminology between v3 Provision and v4 Provision.

With the change to Version 4, a number of the terms used and the way that the reference data for Provision is set up has changed for Version 4 as follows:

v3 Provision	v4 Provision
Provision Year	<p>CSS Provision Year</p> <p>These will be maintained similarly via: Services CSS Provision Year</p>
<p>Provision User Codes :</p> <p>Type= Provision</p>	<p>Services</p> <p>Focus Services Services</p> <p>One or more services must belong to a Service Category.</p> <p>Focus Services Service Categories</p>
CSS Services /CSS Support Services	<p>CSS Service Teams</p> <p>Focus Services CSS Service Teams Administration Service Providers (Provision only)</p> <p>Focus Services Service Providers</p>
<p>Provision User Codes :</p> <p>Type = Provision links to CSS Services</p>	<p>Service Provider Links</p> <p>Focus Services Service Provider Links.</p>
<p>Provision User Codes :</p> <p>Type = Funding Body</p>	<p>Funding Bodies</p> <p>Tools Administration Lookups</p>
<p>Provision User Codes :</p> <p>Type = Provision Reason</p>	<p>Provision Reason</p> <p>Tools Administration Lookups</p>
Cost Type	Charge Type (used for migration only)

v3 Provision	v4 Provision
Cost Type links to CSS Service	Unit cost details allocated to Cost type will now be allocated to the <i>Service Provider Link</i> for the <i>CSS Service</i> Focus Services Service Provider Links.
Unit Cost	Cost per Unit Allocated via Service Provider Link Focus Services Service Provider Links
Period Unit	Unit eg Annual School, Yearly etc Allocated via Service Provider Link Focus Services Service Provider Links
Effective Date	Start Date Date Cost becomes effective Allocated via Service Provider Link Focus Services Service Provider Links

Activities

Change of terminology between v3 Support Type and v4 School Support (Activities)

With the change to version 4, a number of the terms used and the way that the reference data for School Support (v3) Activities is set up has changed:

v3	v4
School Support Users can add any data related to visits in the School Support tab.	Activities Users can add an Activity which could be a visit (home, school or other), meeting (e.g. panel meeting, case conference), writing up a report, activity involving children's or families' participation, etc.
Support Service Must define the Support Service.	Service Team The Service Team; all lookups are set up for the Service Team. This is mandatory and the display of all lookups will be dependent on the Service Team selected.
Student Support Details The School Support tab has a sub tab where users can add specific data about the support the students required.	Activities It is possible for users to record specific data against people (which do not have to necessarily be students) for an Activity.
Diary The diary and details of the School Support for a Case Worker.	CSS Calendar When an Activity is saved it will be updated in the CSS Calendar. Users (logged into the system) will be able to view their own Calendar as well as other people's Calendars. It is possible for users to add Activities through the CSS Calendar. For the December 3.34 release there is no link between the CSS Calendar and Microsoft Outlook or any other similar system.

v3	v4
<p>Case Worker</p> <p>The Case Worker setting up the School Support.</p>	<p>Activity Owner</p> <p>This is the person who owns/organises the Activity. When recording new activities this is pre populated by the user logged in the system but can be modified to be any person in the system. The Activity Owner does not necessarily have to be a Case Worker.</p> <p>For School Support records migrated as Activities from v3 the Activity Owner is populated by the Caseworker.</p>
<p>Support Type</p>	<p>Activity Type</p> <p>Must be set up for the Service Team, the Activity Type available for the user to select will depend on the Service Team selected.</p> <p>The Activity Type will be maintained in:</p> <p>Focus Service CSS Service Teams Administration</p>
<p>Focus</p> <p>Can only define 1 Focus.</p>	<p>Focus</p> <p>Users can define more than 1 Focus for an Activity; the Focus available for the user to select will depend on the Service Team selected.</p> <p>The Focus will be maintained in:</p> <p>Focus Service CSS Service Teams Administration</p>
<p>Target Group</p> <p>Can only define 1 Target Group.</p>	<p>Target Group</p> <p>Users can define more than 1 Target Group for an Activity; the Activity Type available for the user to select will depend on the Service Team selected.</p> <p>The Target Group will be maintained in:</p> <p>Focus Service CSS Service Teams Administration</p>
<p>Times (Hrs)</p> <p>The Time that can be defined is seeded.</p>	<p>Activity Time</p> <p>Can add additional Time categories, the Activity Type available for the user to select will depend on the Service Team selected.</p> <p>The Activity Time will be maintained in:</p> <p>Focus Service CSS Service Teams Administration</p> <p>To add additional Activity Time codes use:</p> <p>Tools Administration Lookups Activity Time</p>
<p>Activity</p> <p>It is possible to define only 1 EPM Activity. EPM Activities are derived from the Education Plan set up for Support Services in the Education Plan Monitoring module in One.</p>	<p>EPM Activity</p> <p>It is possible to define 1 or more EPM Activities.</p>

v3	v4
<p>Base</p> <p>Users are only able to define a Base for School Support.</p>	<p>Base</p> <p>There is no concept of a 'School Support' and a Base (including Agencies) can be defined for any Activity which is created.</p>
<p>Agency</p> <p>Users are able to define an Agency for Other Support.</p>	<p>Base</p> <p>There is no concept of 'Other Support' and a Base (including Agencies) can be defined for any Activity which is created.</p> <p>Note: Agencies have been migrated as Bases.</p>
n/a	<p>Site</p> <p>Will be defaulted to the main site of the Base (if it has been defined) but can be modified.</p>
n/a	<p>Location</p> <p>Will be defaulted to the Address of the Base/site if this has been defined. The Location can be modified and can be defined without defining a Base/site to allow the recording of 'home visits'.</p>
<p>Item List</p>	<p>Linked Activities</p> <p>Allows users to record sub-Activities for an Activity i.e. A visit in a school may consist of 1 or more meetings.</p>
<p>Student</p> <p>Allows to link students.</p>	<p>Linked People</p> <p>Allows users to link 1 or more people to the Activity.</p>
n/a	<p>Scheduled to Attend</p> <p>Can define 1 or more linked people as Scheduled to Attend e.g. where the Activity is a meeting.</p>
n/a	<p>Attended</p> <p>Can define 1 or more linked people as Attended, this will help identify who actually Attended the Activity e.g. a meeting.</p>
n/a	<p>Lead Practitioner</p> <p>Can define a linked person as a Lead Practitioner. Only one person to be identified as Lead Practitioner, if the Activity is flagged to be sent to Contact Point then it will be mandatory to flag the Lead Practitioner.</p>
n/a	<p>Subject</p> <p>Can define a linked person as a Subject, more than 1 person can be the Subject of the activity (normally a child but can be anyone except the person identified as the Lead Practitioner).</p>
<p>Start Time</p> <p>Can be defined for each linked student.</p>	<p>Start Time</p> <p>Can be defined for each linked person.</p>

v3	v4
<p>End Time Can be defined for each linked student.</p>	<p>End Time Can be defined for each linked person.</p>
<p>Support Time The total sum of the Start Time and End Time for each linked student.</p>	<p>Total Time The total sum of the Start Time and End Time for each linked person.</p>
<p>Group Size Can only be defined for the linked students.</p>	<p>Group Size Can be defined for each of the Linked People and for the Activity.</p>
<p>Support Details Code Can only be defined for the linked students.</p>	<p>Support Type Users can define more than 1 Support Type for an Activity; the Support Type available for the user to select will depend on the Service Team selected. The Support Type will be maintained in: Focus Service CSS Service Teams Administration</p>