

IIZUKA - Quick guide for volunteer mentors **CCN adapted version**

What is iizuka for?

The iizuka system is a way of recording:

- Information about the client you work with
- Meetings that you have with the client • Any change in pathway assessments
- Internal change forms.

Remember: we use the information that you put into iizuka to produce evidence about the work that community chaplaincy is doing – both locally and nationally. The more information you put in, the more useful reports we can produce.

Who is this guide for?

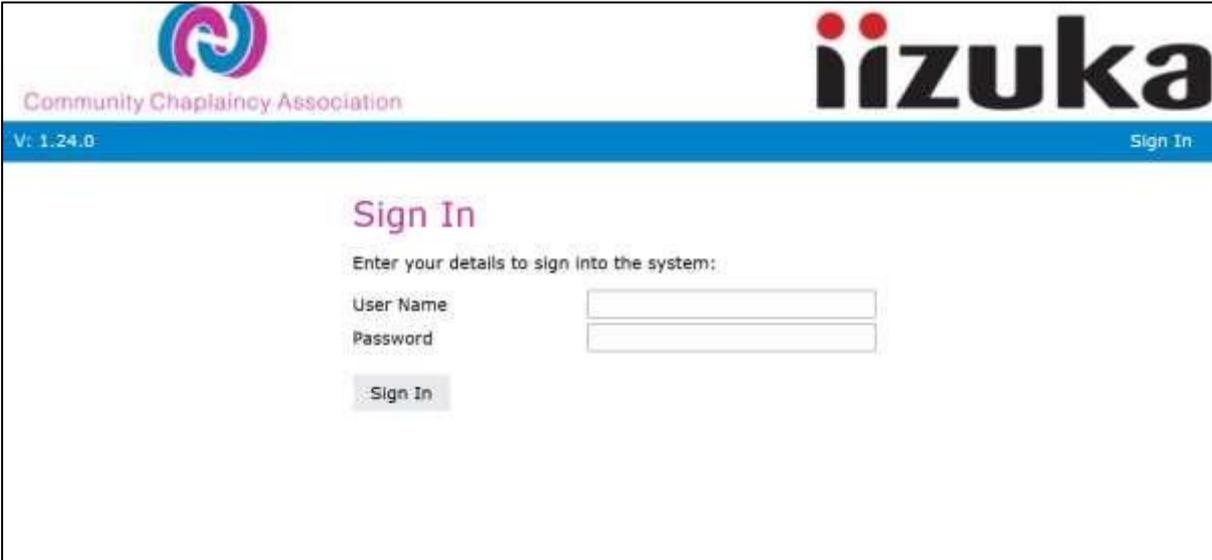
This guide is for volunteer mentors who are working with clients – it assumes that the initial record for the client will have been created by a member of staff.

A full user guide for iizuka is available from Nada, who can also provide support if you need it (see below for contact details).

Getting started

Sign in

When you go to <https://casemanager.co.uk/cca> you will be asked to sign in.



The screenshot shows the iizuka sign-in interface. At the top left is the Community Chaplaincy Association logo and name. At the top right is the 'iizuka' logo. Below the header is a blue navigation bar with 'V: 1:24.0' on the left and 'Sign In' on the right. The main content area is titled 'Sign In' and contains the instruction 'Enter your details to sign into the system:'. There are two input fields: 'User Name' and 'Password'. Below the fields is a 'Sign In' button.

The user name will be your email address.

The password will have been given to you.

Changing Passwords

Upon first login, the password must be changed to a memorable secure password with the following rules:

- Password must contain at least one lower case character
- Password must be at least 8 characters long
- Password must contain at least one special character from the following:
@ # \$ % ^ & + =
- Password must contain at least one number
- Password must contain at least one upper-case letter

You can change the password at any time

To do this, click Change Password from the My Profile menu on the Home Screen



Finding the record for the person you are working with

Clients you are already working with will be displayed on your home screen under 'My Cases'.

Clicking on any of these will take you directly to the **case details**

If you need to make changes to details about the **client** (e.g. personal details or referral details).

From the Home Screen, click **Search** from the **Top Menu Bar**

Enter the known details for the client (for ease it may be beneficial to search under first and last name) and click 'Find'.

You will see the Basic Client Details and any Cases in a list at the bottom of the screen.

There will normally only be one case, but it may be that community chaplaincy have worked with this person before.

Click on the relevant Case to view and/or edit that case.

Changing Client Details

Note: If you have clicked through directly from your cases on the home page – you will need to click on the Client ‘breadcrumb’ to return to this screen

If need to add to the client details or change anything, click on **Edit details** from the list of ‘client tasks’ on the left-hand side.

Important: The more details you can add the better. The ‘personal details’ section is particularly useful. If we all record details about ethnicity, drug or alcohol use, and faith etc we will be able to create good evidence about the cross section of people we work with.

Your Location: Home > Client

Client Tasks

- Edit details**
- Add case
- Add relationship
- Merge client
- Add security permission
- Anonymise

Client Details

Mr A Test

Reference	CL-RYMSHR
Date of birth	01/03/1960
Age	S7
Gender	Male
Flags	No Flag of concern

Contact Details

Primary telephone	
Mobile telephone	
Evening telephone	
Email	
Address	A Test, 39 Some Street, Authority: , Ward:

Identities

NINO

Advisory Notes

Personal Details

Edit the details which need to change

Click Save

Editing or adding to the case you are working on with that client

At the bottom of the screen ‘Client details’ screen, click on the case.

All actions that have been recorded on the iizuka system for that case are listed at the bottom of the screen under ‘Case Actions’ in date order (most recent first).

Click on any ‘case action’ or the page icon in the right-hand column to see more information.

Status	Date	Type	Summary	Owner	Actions
Complete	11/05/2018 11:13	3. Completed Pathway Action		Nada Savitch (Nada : CCA)	
Complete	11/05/2018 11:11	2. Pathway Assessment		Nada Savitch (Nada : CCA)	
Complete	11/05/2018 11:10	Record a Meeting Form	First pathway assessments	Nada Savitch (Nada : CCA)	
Complete	11/05/2018 11:08	Record a Meeting Form	First meeting	Nada Savitch (Nada : CCA)	
Complete	11/05/2018 11:08	Opening Contact	CCA	Nada Savitch (Nada : CCA)	

Editing case details – not necessary for many volunteer mentors

Much of this might have been completed. However, you can add information as you get to know more.

Click on ‘Edit details’ to change

Important: Information such as PNC (Police National Computer) number is useful for us to attempt to tie up our data with reoffending rates.

Important: The referral data is section should be used to record information about the person before they have undergone their first pathways assessments and had their status changed from ‘referral’ to ‘client’ on the iizuka system.

Chaplaincy: Community Chaplaincy

Summary

Description

Open Date

- ▶ Consent
- ▶ Client Category (i)
- ▶ Risk Assessment and Communications Actions (i)
- ▶ Referral
- ▶ Unsuccessful Referrals (i)
- ▶ Criminal Justice Details
- ▶ Release Dates (i)
- ▶ Other Details

Available Actions			
Description	Owner	Type	Actions
DOWNLOAD for mobile users	Me	1. Book an appointment and get forms Duration: 60 (mins)	<input type="button" value="Add"/>
Record Pathway Assessments	Me	2. Pathway Assessment	<input type="button" value="Add"/>
Pathway Action	Me	3. Completed Pathway Action	<input type="button" value="Add"/>
Internal Change Action	Me	4. Completed Internal Change Action	<input type="button" value="Add"/>
Risk Assessment Communications Action	Me	5. Add a Risk Assessment Communications Action	<input type="button" value="Add"/>
Add a Contact or Activity Log	Me	6. Add a Contact or Activity Log	<input type="button" value="Add"/>
Start an Internal Change Form	Me	Internal Change Form - Chaplaincy (CCA)	<input type="button" value="Add"/>
Record a Meeting Form	Me	Record a Meeting Form	<input type="button" value="Add"/>

On the right-hand side of the Case Details screen, you will see available actions.

The actions in this guide are:

- Record a Meeting **CCN do not use this**
- Pathway Assessment
- Internal Change forms
- Pathway Action
- Internal Change Assessment
- Internal Change Action

Contact Log

Meeting Feedback Form

The mentoring meeting feedback form allows you to record information about the mentoring meetings you have with your client. Other contact can be recorded under the Contact Log, **this is the method CCN prefer use for all client work.**

Before the meeting, you will find it useful to refer to the iizuka record to discuss progress from the last meeting.

Important: If you are completing a mentoring feedback form, it is very likely that you will also need to complete other actions on iizuka, for example:

- pathway assessments
- internal change assessments

If you do decide to use a meeting feedback form, that is ok – here is how to do it.

To complete a Meeting Feedback form, search for and select the appropriate Client and corresponding Case.

From the Case Details screen select the **'Record a Meeting Form'** (the bottom option from the Available Actions).

Input the required information. **Don't forget to complete assessments and actions in addition to the meeting form. This will allow analysis to be carried out to measure impact.**

Tip: The date will be set as the date you are entering the data, but you can change this manually.

The screenshot shows the 'Add Action' form for 'Record a Meeting Form'. The form is titled 'Add Action' and 'Record a Meeting Form'. It has a section for 'Action Details' with fields for 'Date' (10/05/2018 09:44) and 'Summary'. Below this is a 'Meeting Feedback Form' section with a purple header. The form includes fields for 'Type' (Mentoring meeting), 'Location', 'Time Started', 'Time Ended', 'Nominated Person contacted before meeting', and 'Nominated Person contacted after meeting'. There are two large text areas for 'Progress made leading up to and at this meeting' and 'Actions agreed to take forward from this meeting'. A dropdown menu for 'At what stage in the process of change (Theory of Change) is the mentee?' is set to 'Not Set'. There is also a field for 'Other notes and comments'. At the bottom, there is an 'Attachment' section with a 'Browse...' button and 'No file selected.'

Click OK to save (or cancel to discard) – vital to do this otherwise all your entry is lost!

Important: Please add as much information as possible – for example completing the time started and ended fields will enable us to create evidence about how much time we are spending with the people we are supporting.

Pathway Assessments

Important: The very first pathway is used as a baseline for comparison and to monitor progress and outcomes. Please try to assess as many pathways as possible.

Assessments should reflect only those areas of the client's life which are being supported by the mentoring relationship. (If not, please use 'N/A').

After the initial Pathway Assessment is complete the Mentor should complete a new Assessment whenever a significant change occurs.

There is a step by step guide for this on the CCN website in Mentor's Area / lizuka.

To complete a Pathway Assessment, search for and select the appropriate Client and corresponding Case.

From the Case Details screen select the 'Record Pathway Assessments' from the Available Actions (number 2).

Enter the date on which the assessment took place.

Select the Assessment score for each Pathway Area (or leave as not assessed).

Enter any Notes/comments to clarify your choice.

Repeat for each area.

The screenshot shows a web form titled "Add Action" with a sub-heading "2. Pathway Assessment". Under "Action Details", there is a "Date" field containing "10/05/2018 12:12". Below this is a list of pathway areas, with "Pathway 01 - Housing/Accommodation" selected and highlighted in pink. For this pathway, there is an "Assessment" dropdown menu set to "Not Assessed" and a "Notes/Comments" text area. Other pathway areas listed include Pathway 02 - Finance/Benefit Debt, Pathway 03 - Mental Health, Pathway 04 - Physical Health, Pathway 05 - Substance Misuse, Pathway 06 - Education / Training, Pathway 07 - Employment / Volunteering, Pathway 08 - Children / Family, Pathway 09 - Domestic Violence / Abuse, Pathway 10 - Sex work, Pathway 11 - Sex Abuse, and Pathway 12 - Self Harm. At the bottom, there is an "Attachment" field with a "Choose file" button and "No file chosen" text, and "OK" and "Cancel" buttons.

Click OK (or cancel to discard) – vital to do this otherwise all your entry is lost!

Pathway actions

Pathway actions should be completed to illustrate what activities have been taking place in between assessments.

If there has been a change in an assessment it is vital that a pathway action is completed to illustrate why that change has occurred.

However, it is also important to record activities that have not been 'successful' in terms of pathway assessments.

Some pathway actions are specific to a particular pathway. Others are more generic and may be applied to any pathway.

There is a step by step guide for this on the CCN website in Mentor's Area / lizuka.

To complete a Pathway Action, Search and select the appropriate Client and corresponding Case.

From the Case Details screen select the 'Pathway Actions' from the Available Actions list by clicking 'Add'.

Choose the best fit for the activity/action – you should add detail in the notes section. Always consider what internal change actions may have also been made and record these separately.

Note: You can change the date to reflect the date the action occurred.

The screenshot shows the 'Add Action' form with the following details:

- Title:** 3. Completed Pathway Action
- Section:** Action Details
- Date:** 09/09/2016 10:08
- Pathway Action:** A dropdown menu with 'Not Set' selected.
- Action:** A dropdown menu with 'Not Set' selected.
- Notes:** A text area with up and down arrow icons.

Click **Add**

To view the detail at a later date, scroll to the Case Actions and select the Action from there.

Internal Change Assessment

The initial Internal Change Assessment is to be complete at the earliest appropriate opportunity from meeting the client; the first is to be used as a baseline for comparison and to monitor progress and outcomes.

After the initial Internal Change Assessment is complete the Mentor should complete a new Assessment whenever a significant change occurs but at the very least every 6-8 weeks until the end of the client's Case.

To complete an Internal Change Assessment, search and select the appropriate Client and corresponding Case.

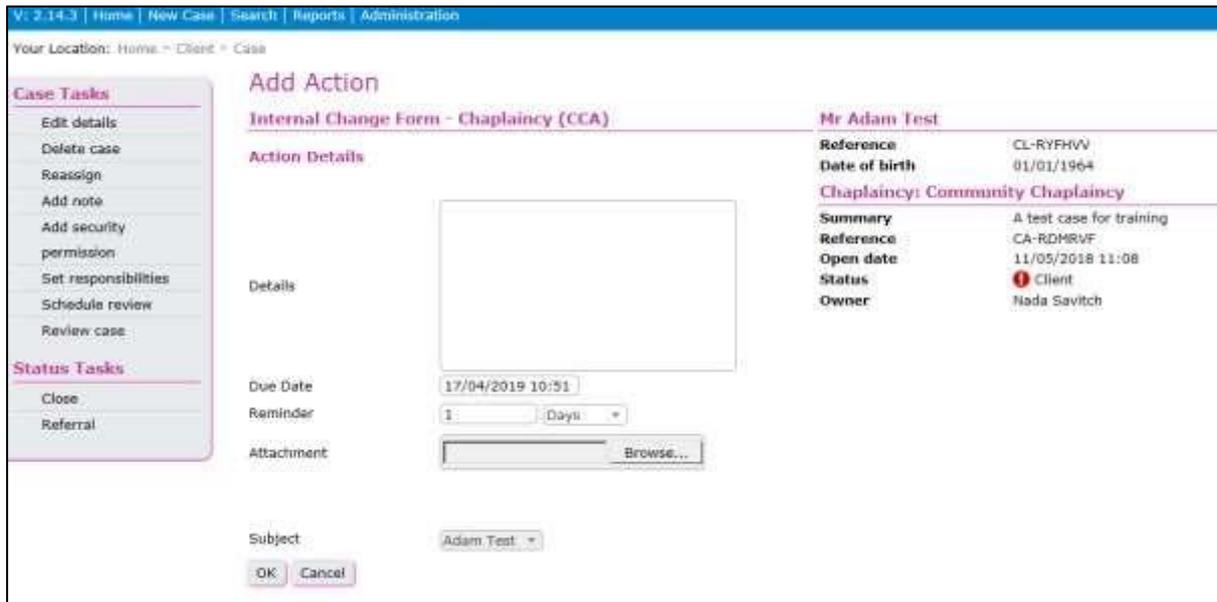
The screenshot shows the 'Add Action' form for a 'Meeting Feedback Form' with the following details:

- Title:** Record a Meeting Form
- Section:** Action Details
- Date:** 10/05/2018 09:44
- Summary:** A text area.
- Meeting Feedback Form:** A form with fields for Type (Mentoring meeting), Location, Time Started, Time Ended, Nominated Person contacted before meeting, and Nominated Person contacted after meeting. It also has text areas for 'Progress made leading up to and at this meeting' and 'Actions agreed to take forward from this meeting'. A dropdown menu for 'At what stage in the process of change (Theory of Change) is the mentee?' is set to 'Not Set'. The 'Other notes and comments' field is circled in red.
- Attachment:** A 'Browse...' button with 'No file selected.'

Under Available Actions, click on Add next to Start an Internal Change Form.

There is a step by step guide for this on the CCN website in Mentor's Area / Iizuka.

To create the action, you need to add some details and click OK. The 'Details' box can be used to record information about the situation surrounding the assessment.



To enter scores, click on Start Assessment, from the left-hand side menu of the Internal Change Form – Details page.



Choose an area of change and then click on the drop-down menus to choose a score.

For each area of assessment enter two scores (the client's view and the mentor's or caseworker's view) and the level of need (if in doubt use N/A for level of need).

Add comments to explain the scoring.

V: 2.14.3 | Home | New Case | Search | Reports | Administration

Your Location: Home > Client > Case > Case Action

Case Action Tasks:

- Edit details
- Delete case action
- Abandon
- Reassign
- Add security permission

Attachment Tasks:

- Add attachment

Assessment Tasks:

- Continue assessment

Internal Change Form – Chaplaincy (CCA)

Confidence

I feel confident in myself. (Client) Not Set

I feel confident in myself. (Caseworker) Not Set

I feel confident in myself. (Level Of Need) Not Set

Comments:

- ▶ Hope
- ▶ Make Decisions
- ▶ Motivation
- ▶ Resilience
- ▶ Responsibility
- ▶ Self-esteem
- ▶ Support

Mr Adam Test

Reference: CL-RYFHV

Date of birth: 01/01/1964

Chaplaincy: Community Chaplaincy

Summary: A test case for training

Reference: CA-RDMRVF

Open date: 11/05/2018 11:08

Status: ! Client

Owner: Neda Savitch

Usability note: Ignore goals and actions. The action is not an internal change action and this will not be featured within the outcome reports, therefore only use actions within this section if it is useful to the user and not a duplication.

After adding data you can:

- Click **SAVE** to save what you have done so far, to be completed later on, or
- Click on **COMPLETE** if the assessment is complete. **Note you cannot make any changes after doing this.**

V: 2.14.3 | Home | New Case | Search | Reports | Administration

Your Location: Home > Client > Case > Case Action

Case Action Tasks:

- Edit details
- Delete case action
- Abandon
- Reassign
- Add security permission

Attachment Tasks:

- Add attachment

Assessment Tasks:

- Continue assessment

Self-esteem

Support

Use of time

I am making good use of my free time by doing more constructive (Client) Not Set

I am making good use of my free time by doing more constructive. (Caseworker) Not Set

I am making good use of my free time by doing more constructive. (Level Of Need) Not Set

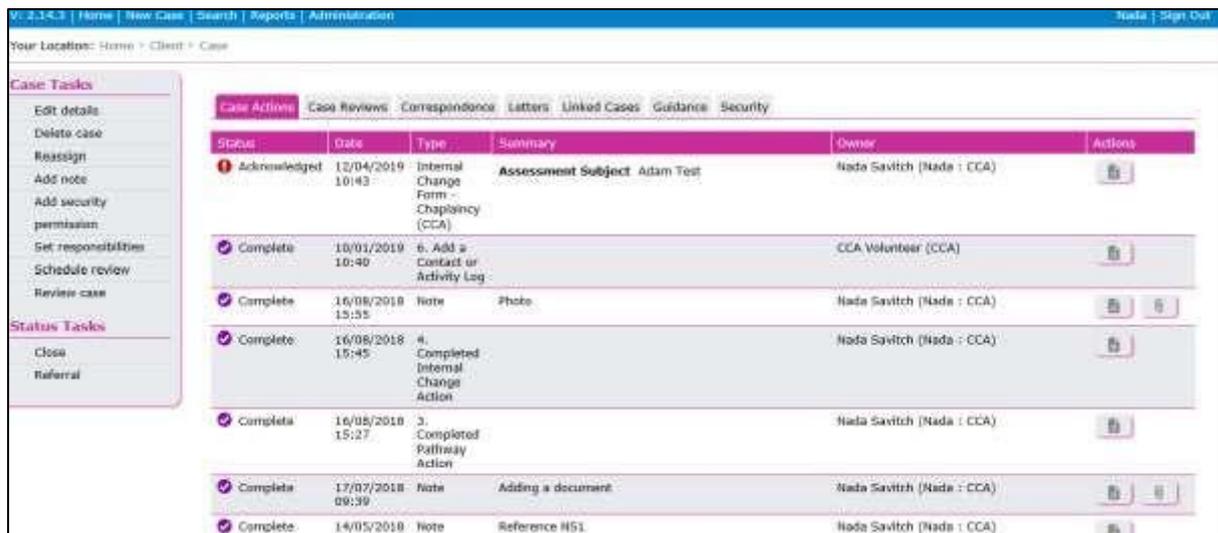
Comments:

Assessment Actions

+

Complete
Save
Cancel

If you Click on SAVE, you can go back to the assessment by clicking on it from the list of Case Actions on the Case Details screen.



At the bottom of the left-hand menu Internal Change Form – Details screen, the Start Assessment option will now say ‘Continue Assessment’.

Usability tip: You can only have one internal change assessment open at one time.

If you have an assessment that is not complete, the ‘Start an Internal Change Form’ option will not be listed under ‘Available Actions’ on the Case Details screen.

Internal Change Actions

Internal Change Actions are recorded against the Internal Change Assessment Areas to show what actions have contributed to an Assessment Area. Please note that an Internal Change Action is an attempt to effect change on a particular area of assessment - the outcome may or may not be achieved.

Internal change actions should back up any changes in assessments.

Internal Change Actions relate to how the client is supported to change their attitudes and behaviour, rather than practical considerations of Pathway Actions. The categories are: Building social networks, Encouragement, Listening, Personal & Emotional Support and Problem solving. There is also space to add other types of actions and details.

To complete an Internal Change Action, search and select the appropriate Client and corresponding Case.

There is a step by step guide for this on the CCN website in Mentor’s Area / Iizuka.

From the Case Details screen select the ‘Internal Change Actions’ from the Available Actions list by clicking Add

Update the Internal Change Action.

Add Action

4. Completed Internal Change Action

Mr A Test

Action Details

Date: 27/04/2017 14:25

Internal Change Action

Area: Not Set

Action: Not Set

Other Details:

Attachment: Browse... No file selected.

Add Cancel

Chaplaincy: Community Chaplaincy

Summary

Reference: CA-RDCSLJ

Open date: 16/10/2015 11:00

Status: Referral

Owner: Matt Wall

Amend the date to reflect the date the action occurred.
Then select one of the Areas the action applies to. Then select the action and input any appropriate notes.

Click **Add**. To view the detail at a later date, scroll to the Case Actions and select the Action from there.

More support and guidance

This guide is only a brief outline of some of the features of the iizuka system. If you need to know more, ask your mentoring supervisor.

Nada at the Community Chaplaincy Association is also available to help.

Nada Savitch

Impact Project Officer

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Tel: 07419 357511

Skype: nadasavitch

CCA impact project - Online training resources (Updated 10 March 2018)

Video: *Impact Training* - <https://vimeo.com/229169410/535861eb8e> (30 minutes)

Explores why measuring impact through a tool such as iizuka is necessary.

Recording assessments and actions

In order to measure the impact we have having we need to record: a) assessments of the situation at regular intervals and b) any 'actions' we have done that might affect those assessments.

The first assessments are important because change will be measured against these assessments.

Video: Recording pathway assessment and actions - <https://vimeo.com/229702454/46c746da57> (10 minutes)

An internal change assessment should be done as soon as you can in the mentoring relationship.

Video: Recording internal change assessments on iizuka - <https://vimeo.com/337258223/0b925c76fb> (10 minutes)

Recording meetings

You will also want to record details of the formal mentoring meetings (or through the gate intervention) you have with your client, and also less formal contact.

Video: Recording mentoring meetings

<https://vimeo.com/268955511/994bec5057> (4 minutes)

Video: Keeping a contact log - <https://vimeo.com/229983005/f5f65f0dd5> (4 minutes)