

Children's Centre Management Information System; CCM

Barcoding and messaging guidance

Family Services

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Contents

1. Introduction	5
Table 1: CCM Guidance documents	5
2. Barcoding	6
2.1. Introduction to barcoding	6
2.2. Assigning a barcode to an individual	6
2.2.1 Barcode within the individual's record	6
2.3. Children's centre membership cards	7
2.3.1 Membership card design	7
2.3.2 Producing membership cards	8
2.4. Barcode registers	11
2.4.1 Barcode register for the day	11
2.4.2 Barcode register for date range	12
2.4.3 Barcode register for site activities	12
2.4.4 Barcode register for site sessions	13
2.4.5 Barcode register for site attendees	13
2.5. Producing session registers	13
2.5.1 Barcode basic session list	13
2.6. Opticon barcode scanner	15
2.7. CCM barcode logger application	16
2.7.2 Downloading the data	18
2.8. Loading attendance data to CCM	19
3. Messaging	22
3.1. Introduction to CCM messaging	22
3.2. Messaging consent	22
3.3. Home screen	23
3.4. Messaging	24
3.4.1 Inbox	24
3.4.2 Sent items	25
3.5. Creating groups for messaging	27
3.5.1 Add a group	28
3.5.2 Creating a group using the attendance review or mail merge data extract	28
3.5.3 Inherit from a group	31
3.5.4 Import from a group	31

- 3.5.5 Edit group details..... 33
- 3.5.6 Delete a group..... 33
- 3.5.7 Send to Group 34
- 3.6. Message send..... 34**
 - 3.6.1 Groups..... 35
 - 3.6.2 Recipients..... 37
 - 3.6.3 Message..... 38
- 3.7. Messages tab within the individuals record 39**

- Appendix 1: CCM messaging acceptable use policy..... 42**
- Appendix 2: CCM barcoding and messaging FAQs.....**
- Appendix 3: Suggested sign in sheet template.....**

1. Introduction

The CCM barcoding and messaging guide is aimed at all CCM users.

This guide is to be used in conjunction with the CCM online help.

Table 1 gives details of additional CCM guidance documents that are available.

Table 1: CCM Guidance documents

Document name	Audience
Basic Guide to CCM	<ul style="list-style-type: none"> All CCM users
CCM Framework and Data Guidance	<ul style="list-style-type: none"> All CCM users
CCM guide to recording casework	<ul style="list-style-type: none"> Children's centre management team Family support workers CCM superusers
CCM superuser guide	<ul style="list-style-type: none"> CCM superusers

All CCM guidance documents can be downloaded from the CCM Support page:

www.barnet.gov.uk/wwcib/ccm-support

In addition to the guidance documents listed above there is also a CCM Messaging Acceptable Use Policy (Appendix 1) that must be adhered to when using the CCM messaging module.

2. Barcoding

2.1. Introduction to barcoding

Barcoding within CCM allows the allocation of unique barcodes to individuals and sessions.

In Barnet these barcodes are used to create membership cards for all children's centre users, which can be scanned every time the family attends any Barnet children's centre, which logs their attendance on CCM.

Every centre will have a number of Opticon barcode scanners that can be used in the centre and at community venues to log attendance at sessions. For information about purchasing additional Opticon barcode scanners contact ccm.support@barnet.gov.uk

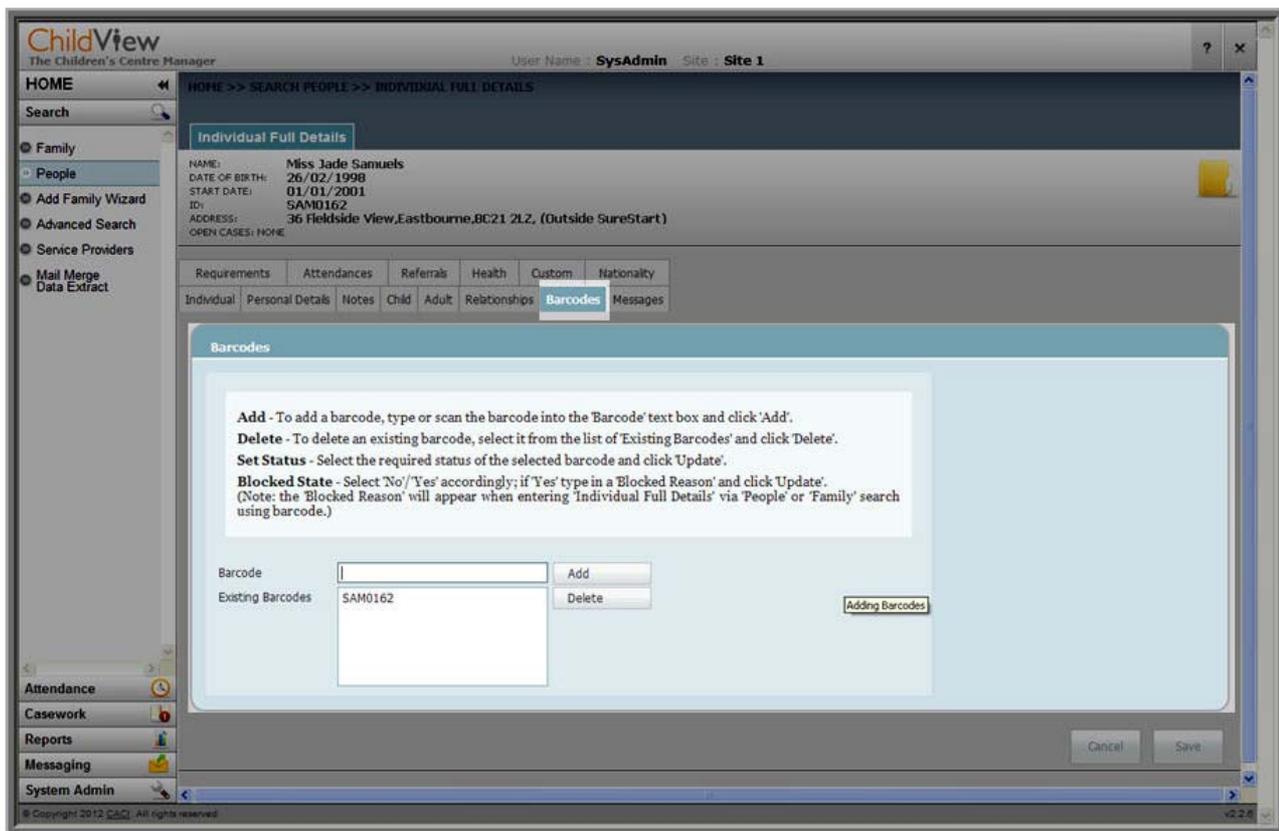
To enable the use of barcoding within CCM the barcode logger application must be installed on the machine that will be used to download the data from the Opticon barcode scanner. For further details on how to download this application contact ccm.support@barnet.gov.uk

2.2. Assigning a barcode to an individual

- When new registrations are entered on CCM barcodes are not automatically assigned.
- CCM Support assigns barcodes in batches to all new registrations at least every two working days.
- Barcodes work on an individual level, not at family level.
- They are unique to each individual and are generated from the individual's identifier.

2.2.1 Barcode within the individual's record

This tab allows you to see if a barcode has been assigned to an individual record, this will be listed in the barcodes tab under existing barcodes:



2.3. Children's centre membership cards

Barnet children's centres have a membership card scheme.

Membership cards should be issued to every individual/family that registers at any Barnet children's centre, this includes families that live out of borough.

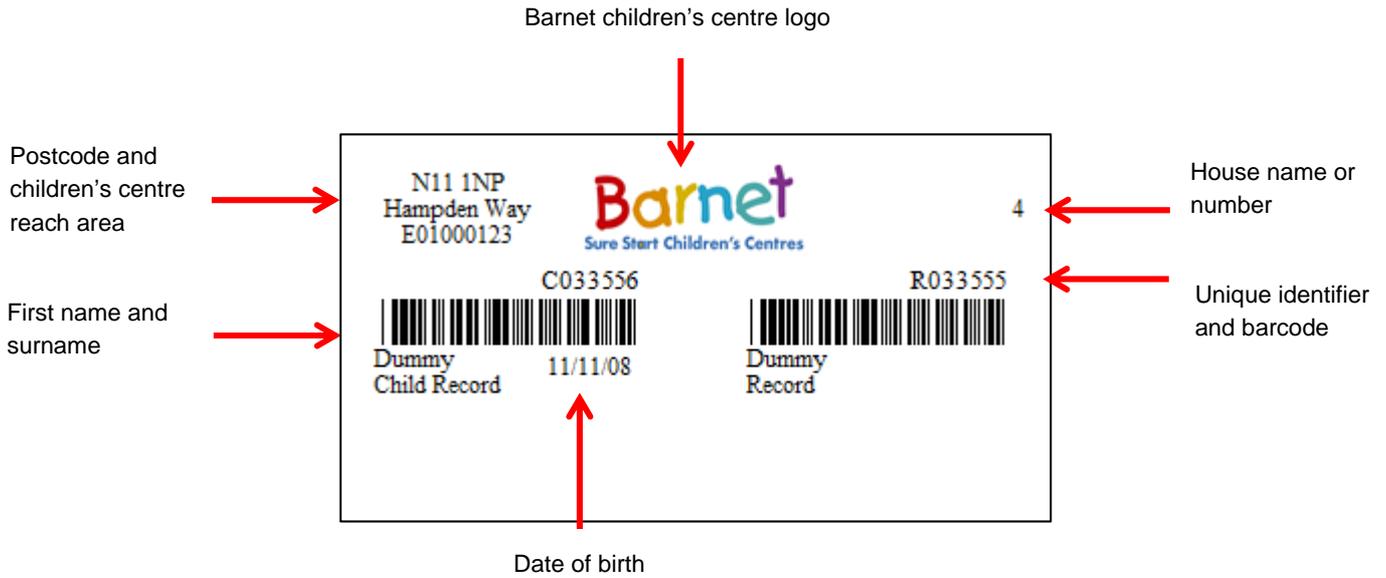
Membership cards are designed to be produced for the whole family¹ however bespoke membership cards can also be produced, see section 2.3.3 for details.

2.3.1 Membership card design

Membership cards are standard business card size and can be used for up to eight family members.

¹ a family is a group of individuals listed at the same address on CCM.

The membership card is designed to show the following details:



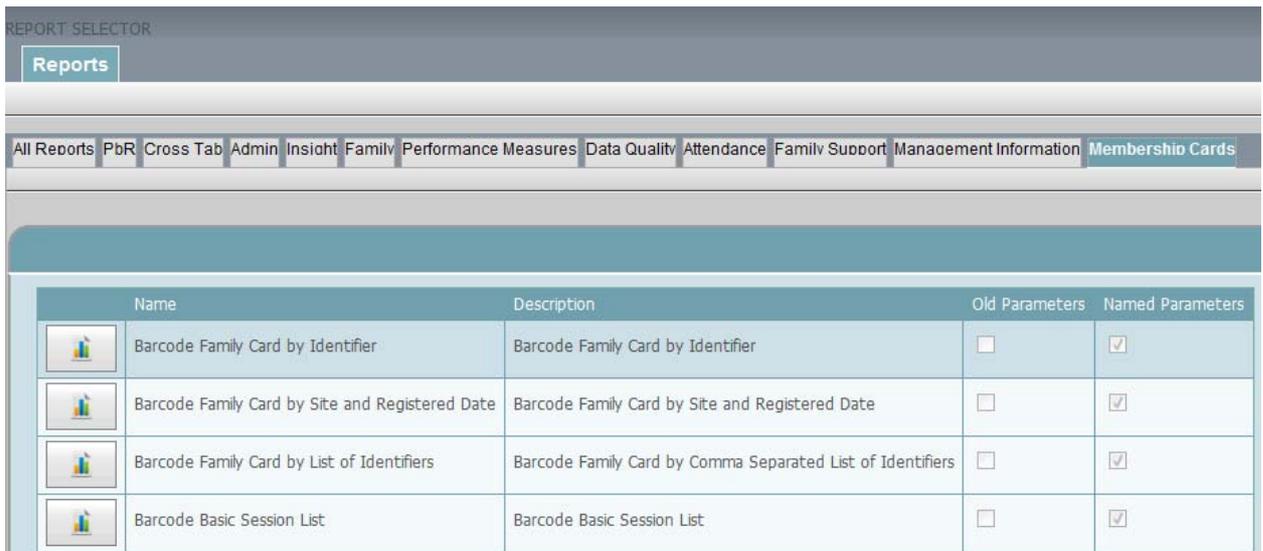
Note: only four family members' barcodes will fit on each side of the card, if there are more than four family members, the card will have to be double sided.

2.3.2 Producing membership cards

Membership cards are produced by running custom reports.

Running a membership card report

1. Click on the 'membership Cards' tab within the reports menu



2. Click the graph icon that is relevant to the membership card report you wish to run
3. Enter the specific parameters

REPORT SELECTOR >> REPORT CONSOLE
REPORTS >> PARAMETERS

Report Parameters

Parameters & Designs

Please Select Site

Please Enter Registration Start Date

Please Enter Registration End Date

Designs exist for the selected report. In order to use one of these, select one from the 'Design Options' list below :

Design Options

4. Click 'Produce Report'
5. The membership cards will then be generated. From here you can print or save the cards.

Note: we would advise that at the end of every week the report titled 'Barcode family card by site and date registered' is used to produce cards for any new registrations that week, and for the families to collect them on their next visit to the centre.

Membership card reports

The following reports are available to produce membership cards:

Report title	Description
Barcode family card by identifier	<ul style="list-style-type: none"> • This report can be used to produce a membership card for one family at a time. • The identifier of one family member is used as the report parameter.
Barcode family card by site and registered date	<ul style="list-style-type: none"> • This report can be used to produce a batch of membership cards. • The centre name and a date range are used as the parameters. • It is advised that this report is used on a weekly basis to produce membership cards for newly registered families.
Barcode family card by list of identifiers	<ul style="list-style-type: none"> • This report can be used to produce membership cards for one family at a time. • The identifier of one individual per family is used as the report parameter (identifiers must be separated with commas).

2.4. Barcode registers

From the Side Menu, click the Attendance button, then click the Barcode Registers option. You will see a screen similar to this:

The screenshot shows the 'Barcode Registers' page in the ChildView system. The page is titled 'Barcode Registers' and has a 'Test Barcoding' button at the top. Below this, there are three main sections:

- Barcode Register for Day:** This section contains a text box explaining that users should select a day and click 'Generate Register' to produce a register for that day. Below the text is a 'Select Day' dropdown menu set to '06 Dec 2012' and a 'Generate Register' button.
- Barcode Register for Date Range:** This section contains a text box explaining that users should select 'Date From' and 'Date To' dates and click 'Generate Register'. Below the text are 'Date From' and 'Date To' dropdown menus (set to '06 Dec 2012' and '13 Dec 2012' respectively), an 'Activities' dropdown menu, and a 'Generate Register' button.
- Barcode Register for Site Activities:** This section contains a text box explaining that users should select which Site and/or Location from lists and click 'Generate Register'. Below the text are 'Select Site' and 'Select Location' dropdown menus, and a 'Generate Register' button.

The interface also includes a sidebar with navigation options like 'HOME', 'Attendance', 'Input', 'Review', 'Barcode Registers', and 'Session Analysis'. The top right corner shows 'User Name : SysAdmin Site : Site 1'.

2.4.1 Barcode register for the day

To produce a register of individuals booked into sessions on a specific date, select a date and click 'Generate Register'. A report will be produced.

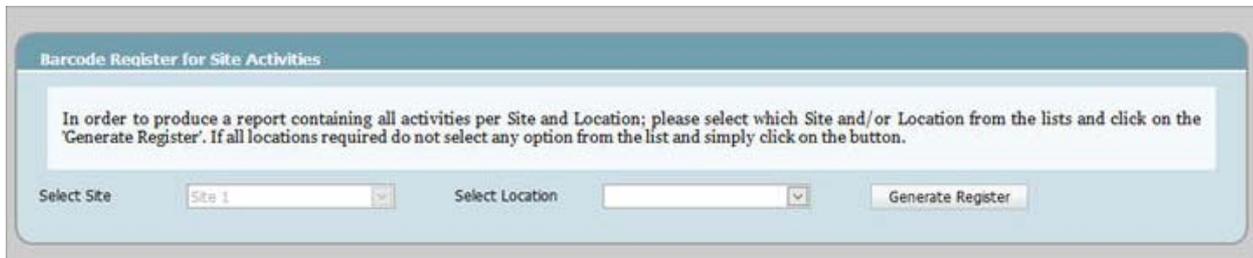
This is a close-up view of the 'Barcode Register for Day' section. It features a text box with the following instructions: 'In order to produce a Register for a specified day; select the required day and click 'Generate Register'; a collection of registers will then be displayed for any Sessions that contain individuals registered on that date.' Below the text is a 'Select Day' dropdown menu currently showing '12 Nov 2012' and a 'Generate Register' button.

2.4.2 Barcode register for date range

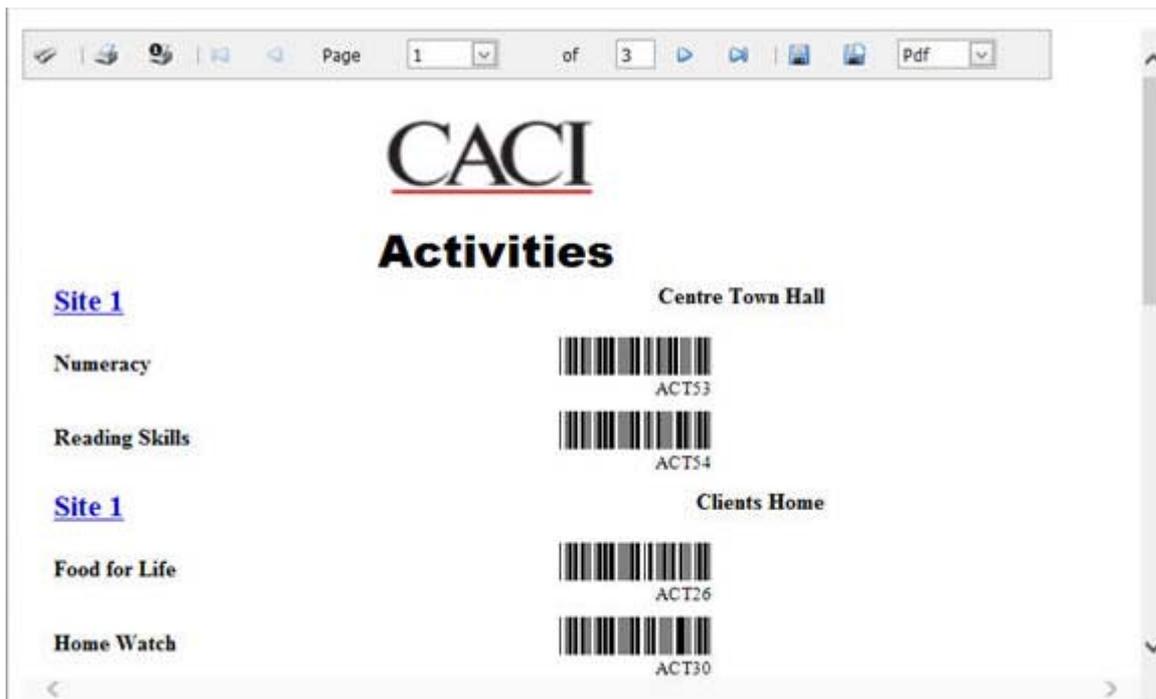
To produce a register of individuals booked into sessions for a date range, select a date range. The register can be restricted to a specific activity by making a selection from the Activities dropdown. Click 'Generate Register' to produce the report.



2.4.3 Barcode register for site activities



To produce a list of activity barcodes for each location at each centre, select a centre and location. Leave the Location blank if all locations are required. Click 'Generate Register' to produce the report as illustrated below. The report can be saved in a number of different formats.



2.4.4 Barcode register for site sessions

To produce a list of session barcodes for each location at each centre, select a centre and location. Leave the Location blank if all locations are required. Click 'Generate Register' to produce the report.

Note: sessions need to be set up in advance of producing this report.

2.4.5 Barcode register for site attendees

To produce a list of barcodes for all individuals who attended an activity at a centre within a selected date range, select an activity, date range and centre. The list can be restricted to monthly (include activities tick box) or session (include sessions tick box) attendances. Click 'Generate Register' to produce the report.

Note: This report can be used if the same attendees attend the same activity on a regular basis rather than scanning each membership card. For example a six week parenting programme.

2.5. Producing session registers

In addition to the barcode register for site sessions report (see section 2.4.5) available in the attendance menu, there is a custom report that can be produced to list.

2.5.1 Barcode basic session list

Within the membership cards tab within the reports menu there is a report titled 'Barcode basic sessions list'.

This report can be run using the following steps:

1. Click on the 'membership Cards' tab within the reports menu
2. Click on the graph icon next to the report titled 'Barcode basic sessions list'
3. Enter the parameters (centre, session start date, session end date) and select the 'basic session barcode list' in the design options
4. Click on the 'Produce Report' button to produce the report as illustrated below.

		
SESSIONS AT Barnfield BETWEEN 10 Nov 2014 AND 11 Nov 2014		
10/11/14	Little Listeners - Jayne Jenkins 2-4 Year Olds 6 Week Programme (Barnfield Childrens Centre)	 ASS91455
10/11/14	Speech & Language Drop In-Shaheeda Bernard (Barnfield)	 ASS91682
10/11/14	School Applications (Barnfield Childrens Centre)	 ASS91693
10/11/14	Family Play Learn & Sing - Temporary Toad Tunnel (Barnfield)	 ASS91658
10/11/14	Little Pebbles Soft Play - Ladybird Lodge (Barnfield)	 ASS91694

Note: sessions need to be set up in advance of producing this report. We would advise setting up all sessions for the coming week on a Friday so that this report can be generated each day.

2.6. Opticon barcode scanner

Every centre will have a number of Opticon barcode scanners that can be used in the centre and at community venues to log attendance at sessions.

For information about purchasing additional Opticon barcode scanners contact ccm.support@barnet.gov.uk

The first time that the Opticon barcode scanner is used on each computer it may need to be installed. For support with installing the Opticon barcode scanner contact ccm.support@barnet.gov.uk

2.6.1 Using the Opticon barcode scanner

The scanner has two buttons:

1. The large button is to be used to scan barcodes
2. The small button is to remove barcodes that have been scanned in error



Note: the scanner does not hold any personal data once it has scanned a membership card. The only data it holds is the identifier of the individual.

2.6.2 Logging attendances using the Opticon barcode scanner

Once the session list has been produced and attendees arrive the following steps should be followed to log their attendance at the sessions:

1. Scan the barcode of the session that the individual would like to attend
Note: if you only have one session running, then you only have to scan the session code once at the beginning. All membership cards that you scan after this will be associated with this session, until a different session barcode is scanned.
2. Scan the barcodes on the membership card of all family members attending that session
3. Download collected attendances from the scanner
See section 2.7

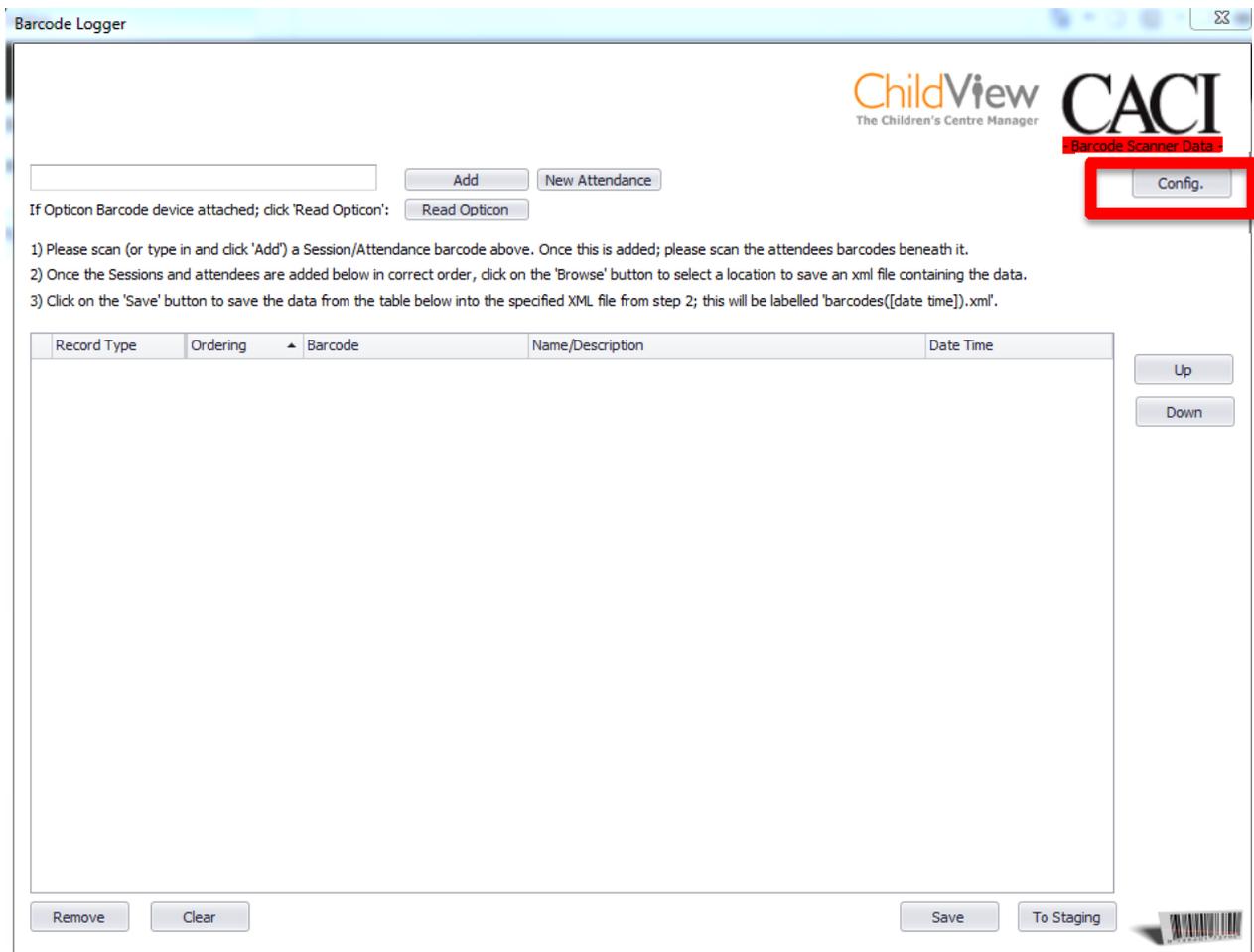
2.7. CCM barcode logger application

To enable the use of barcoding within CCM the barcode logger application must be installed on the machine that will be used to download the data from the Opticon barcode scanner. For further details on how to download this application contact ccm.support@barnet.gov.uk

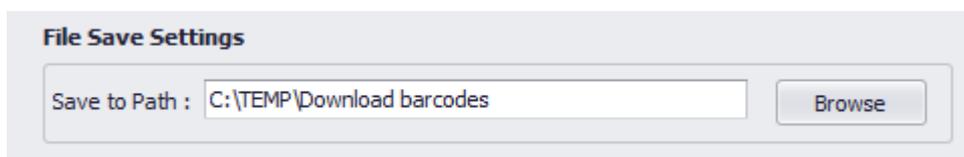
2.7.1 Configuring the application for the first time

The first time that you use the barcode logger application you will need to configure the application.

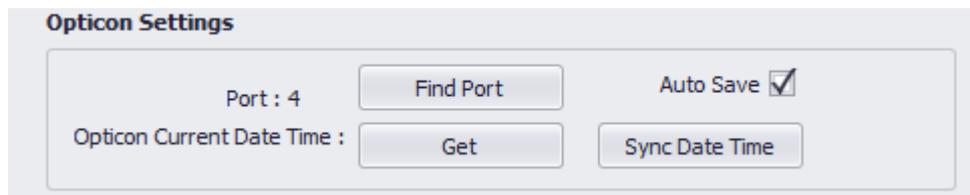
1. Click on the config button



2. You will then need to define a folder location where you want the data collected with the scanner to be stored.



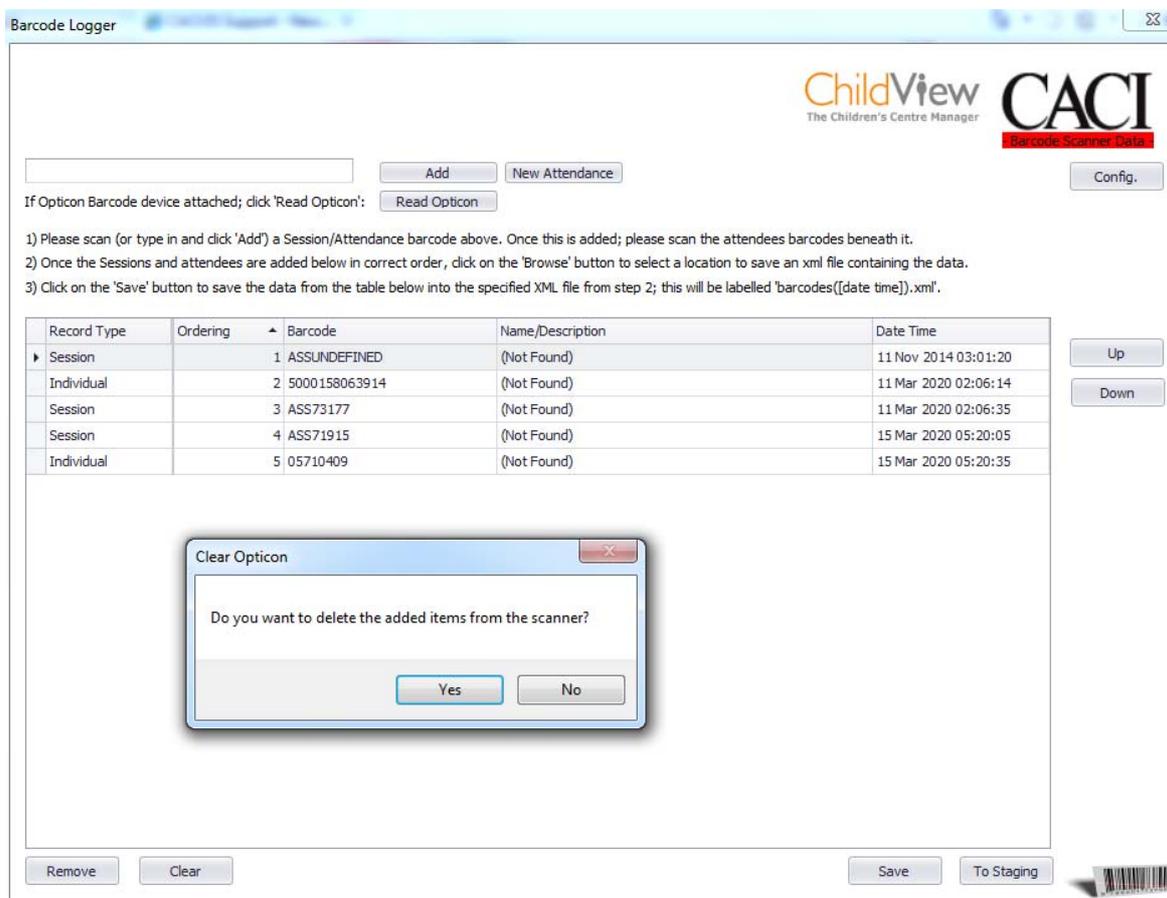
3. Click on the 'Find Port' button. This ensures that your computer can 'see' the scanner.



4. Tick the 'Auto Save' button.
5. Close the config page.

2.7.2 Downloading the data

1. Click the 'Read Opticon' button



Note: you will be presented with an option to delete the added items from the scanner. Select 'yes'. This will delete all data from the scanner.

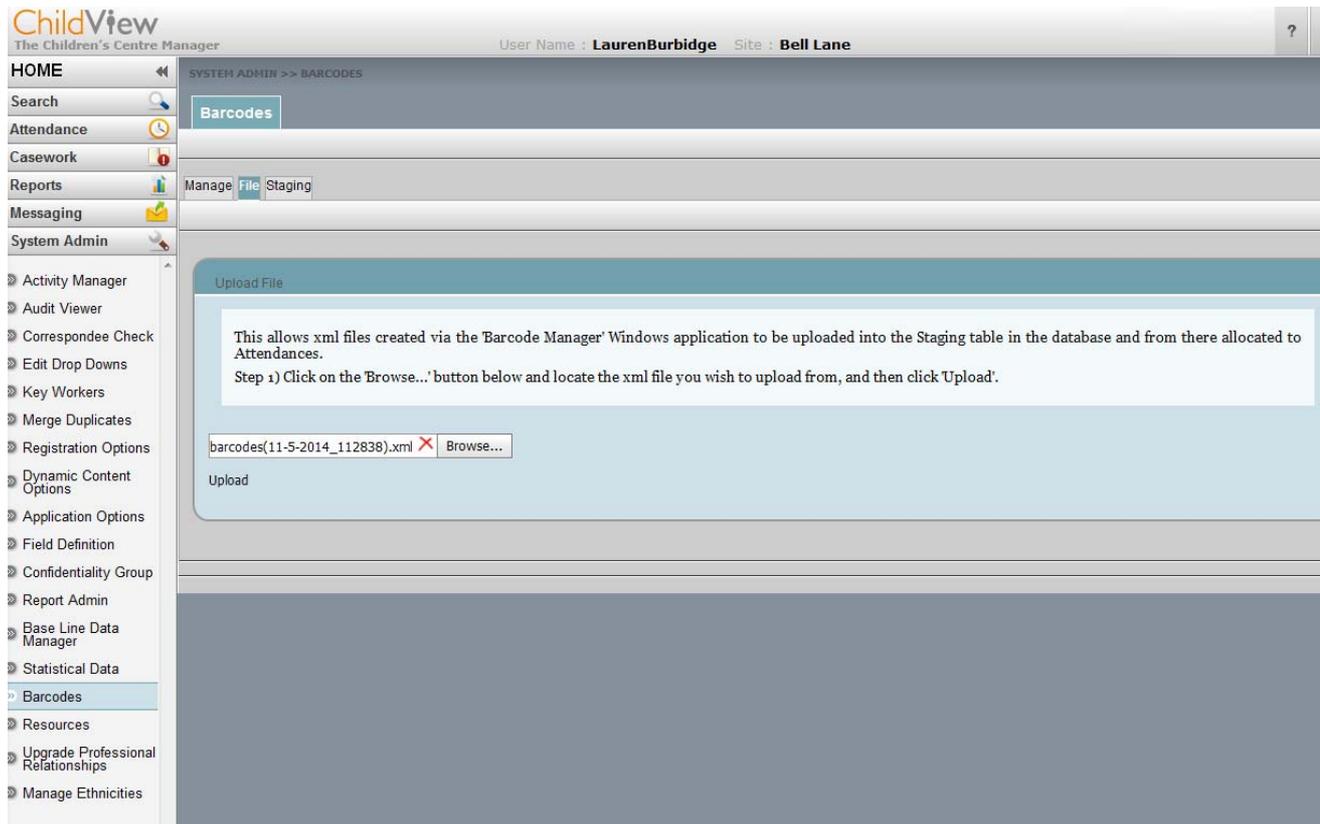
You will have a list of all sessions and individuals whose barcodes have be scanned.

2. Click the 'Save' button. This will create a file in the folder specified on the config page.
3. To finish the process, open CCM.

2.8. Loading attendance data to CCM

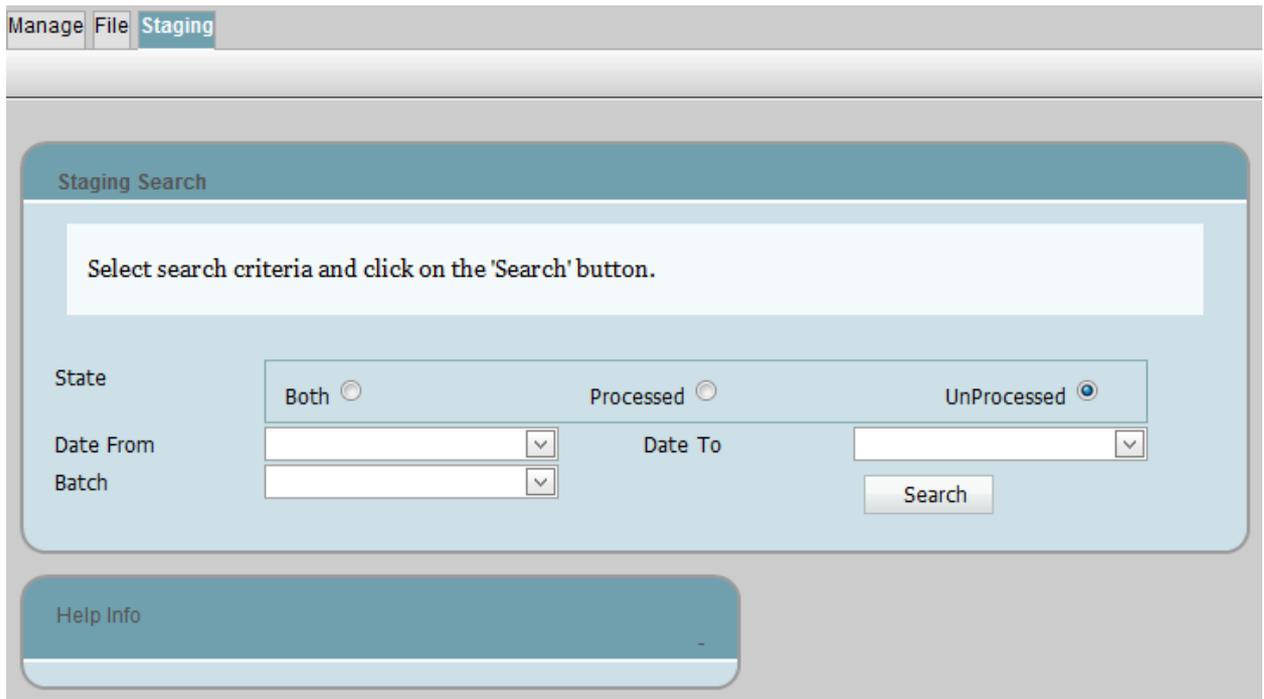
To load the data file created in the barcode logger application:

1. From the Main Menu select System Admin > Barcodes
2. Click on the 'File' tab
3. Browse to the data file created in the barcode logger application and click 'upload'

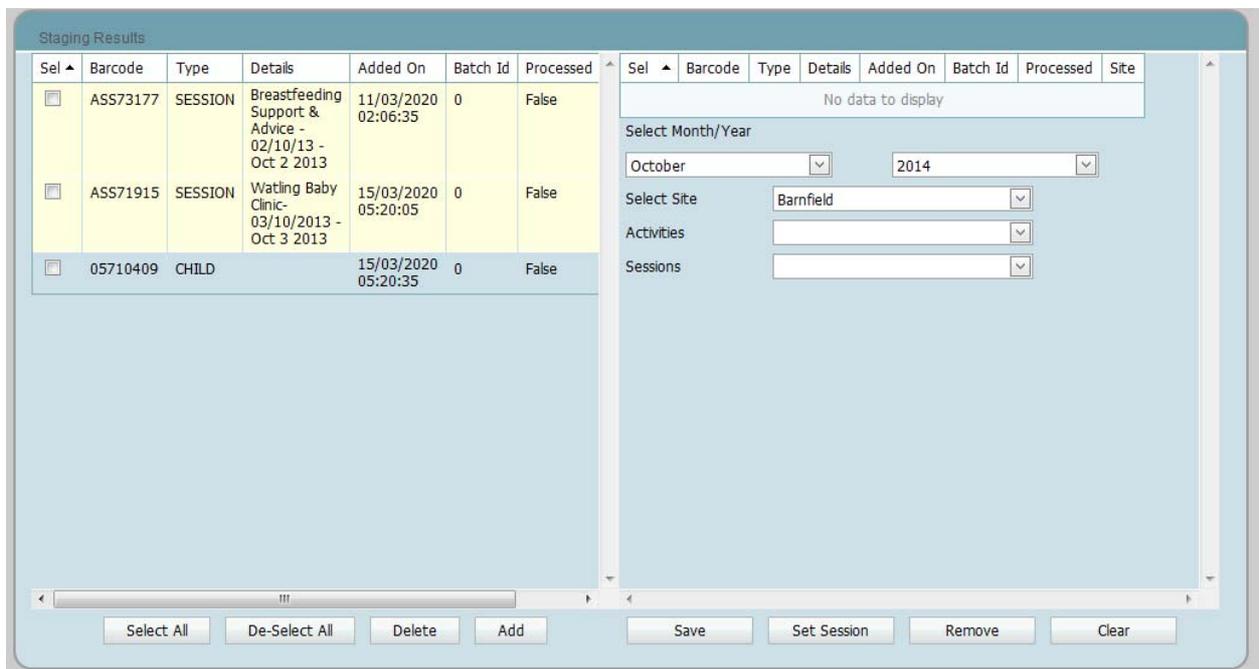


4. Click on 'Save'
5. Click on the 'Staging' tab

6. Search for 'Unprocessed Barcodes'

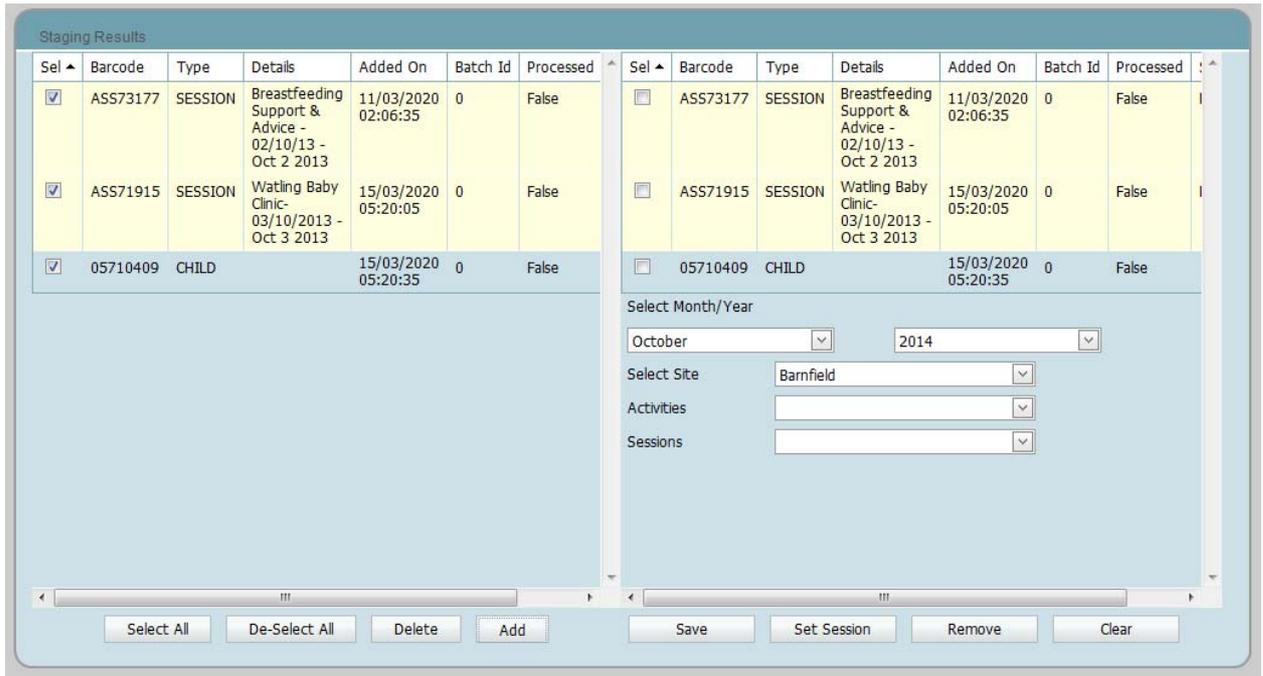


7. You should be able to see the sequence of sessions and individual barcodes that you scanned.



Note: sessions will be highlighted in yellow, and individuals will be blue.

8. Click on the 'Select All' button, the 'Add', then 'Save'



Once you have clicked 'Save' all attendances will be logged in the system.

Note: we recommend that this process is carried out on a daily basis. If the scanner is lost before the data has been downloaded to a computer, there is no way to retrieve this information.

3. Messaging

3.1. Introduction to CCM messaging

The messaging functionality enables the sending and receipt of internal messages (via the CCM database) and external messages (via email and SMS).

Messaging enables communication between Key Workers, and the individuals that they are involved with in terms of Attendance Sessions, Referrals or Casework.

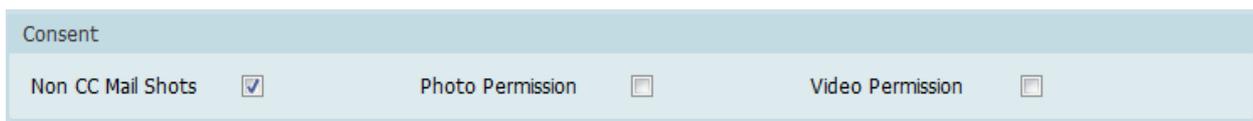
The messaging functionality includes the ability to create groups comprising a mixture of Individuals, Key Workers who are linked to User Accounts and Key Workers who are not linked to User Accounts.

Note: the messaging functionality is only to be used for the purposes set out in the CCM Messaging Acceptable Use Policy (Appendix 1). Failure to comply with this policy will lead to withdrawal of access from the system.

3.2. Messaging consent

Consent must be obtained from individuals before messages to promote the centre are sent out to them.

On CCM consent for messaging is stored in the individuals record on the 'Personal Details' tab. The consent is a tick-box titled 'Non CC Mail Shots'.



If an individual does not want to be contacted by the children's centre this box should be un-ticked.

Please refer to the CCM Messaging Acceptable Use Policy (Appendix 1) for further information about messaging consent.

3.3. Home screen

The Messages section of the Home Page initially shows messages received within a default date range of three months, which have not been marked as 'Read'. The date range can be amended and a different view can be selected. The options are Unread, Read and All (Internal), Email, SMS.

The illustration below shows an example of the Home Page Messages section.

The screenshot displays the ChildView Management Console interface. At the top, there are navigation buttons for Messages (1), Birthdays (0), Referrals (0), Cases (4), Sessions (0), and Families (0). The main content area is divided into two sections: 'Messages In' and 'Birthdays'.

The 'Messages In' section shows a table of messages with the following data:

Title	Text	Expiry Date	Sent On	From	Read	Date Read
Test Message	Test Message -- --- Msg From:...		19/12/2013 11:53:12	Jill Voyce	False	

The 'Birthdays' section shows a table of individuals with birthdays today:

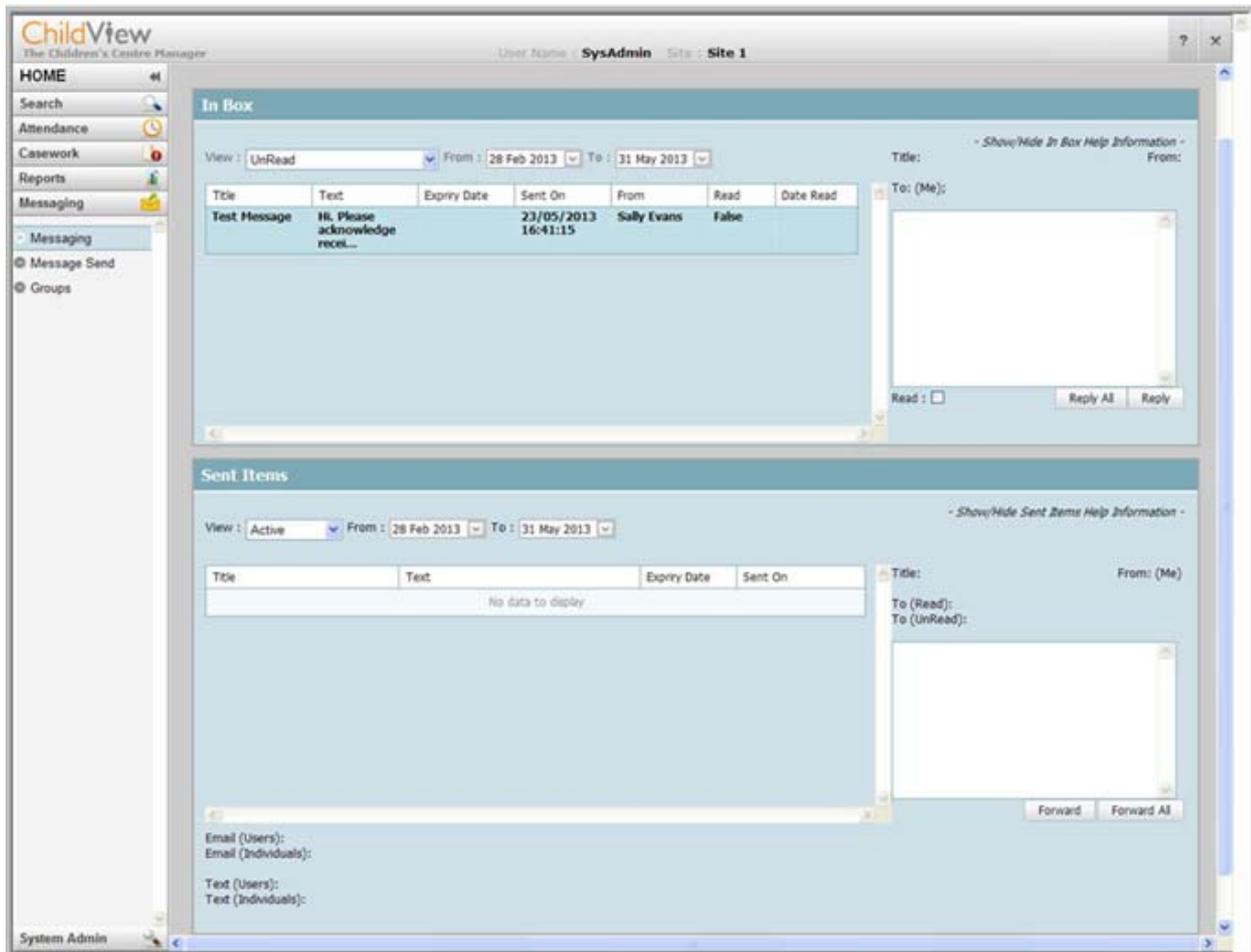
Identifier	Name	Surname	Age	Address	DOB
HUG0113	George	Hughes	37	55 Barnside Field Eastbourne BC3 6DF (East Side)	19-12-1976

The buttons at the top of the screen allow you to move quickly between sections. Click 'View messages' to see full message details, or 'Send Message' to create a new message.

3.4. Messaging

Press the 'Messaging' button in the side menu, then select the 'Messaging' option to gain access to your Inbox, and Sent Items.

A screen similar to the following will be displayed:



3.4.1 Inbox

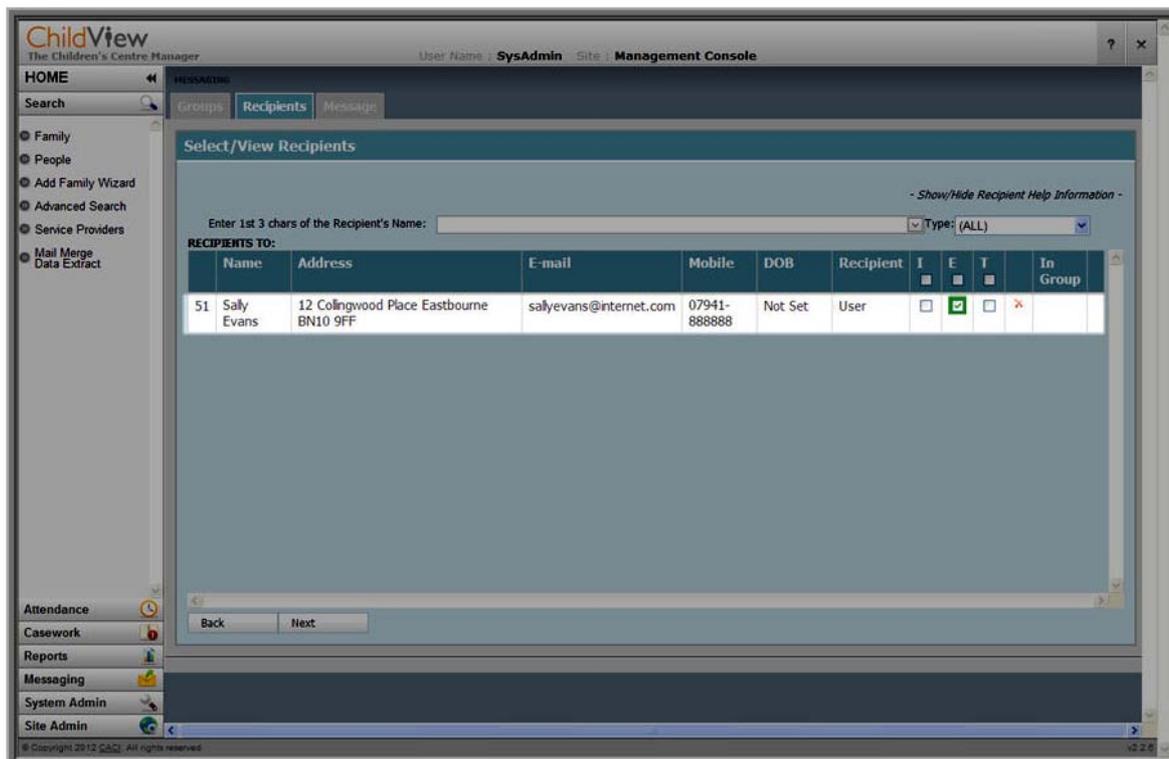
You can change the view of your inbox by selecting from the various message types and specifying a date range.

The options 'Unread', 'Read' and 'All (Internal)' refer to internal messages only. Unread messages are displayed in bold font, and expired unread messages are displayed in red.

Tick 'Read : ' to mark the message as Read - the message will disappear from the grid.

Click 'Reply' or 'Reply All' to open the Message Send window with the Recipients Tab pre-loaded with details of the sender only ('Reply'), or the sender and everyone else that the message was addressed to ('Reply All'). 'Reply All' will include linked and non-linked Key Workers and exclude Individuals.

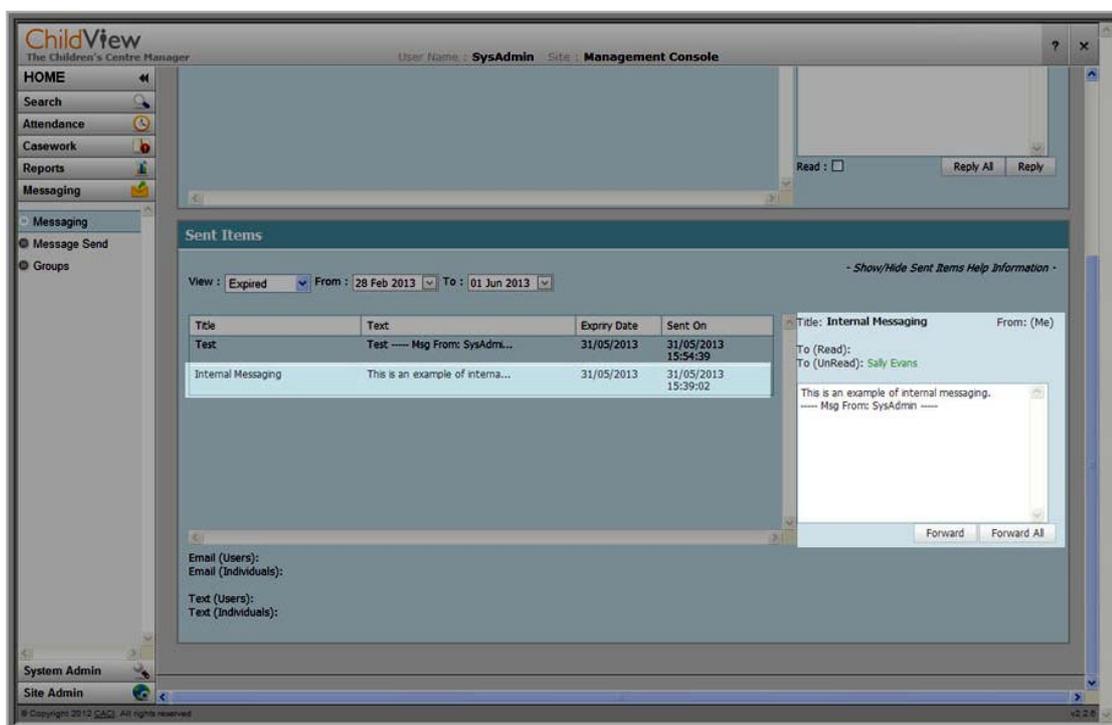
The following example shows the Message Send window opened by the 'Reply' button.



3.4.2 Sent items

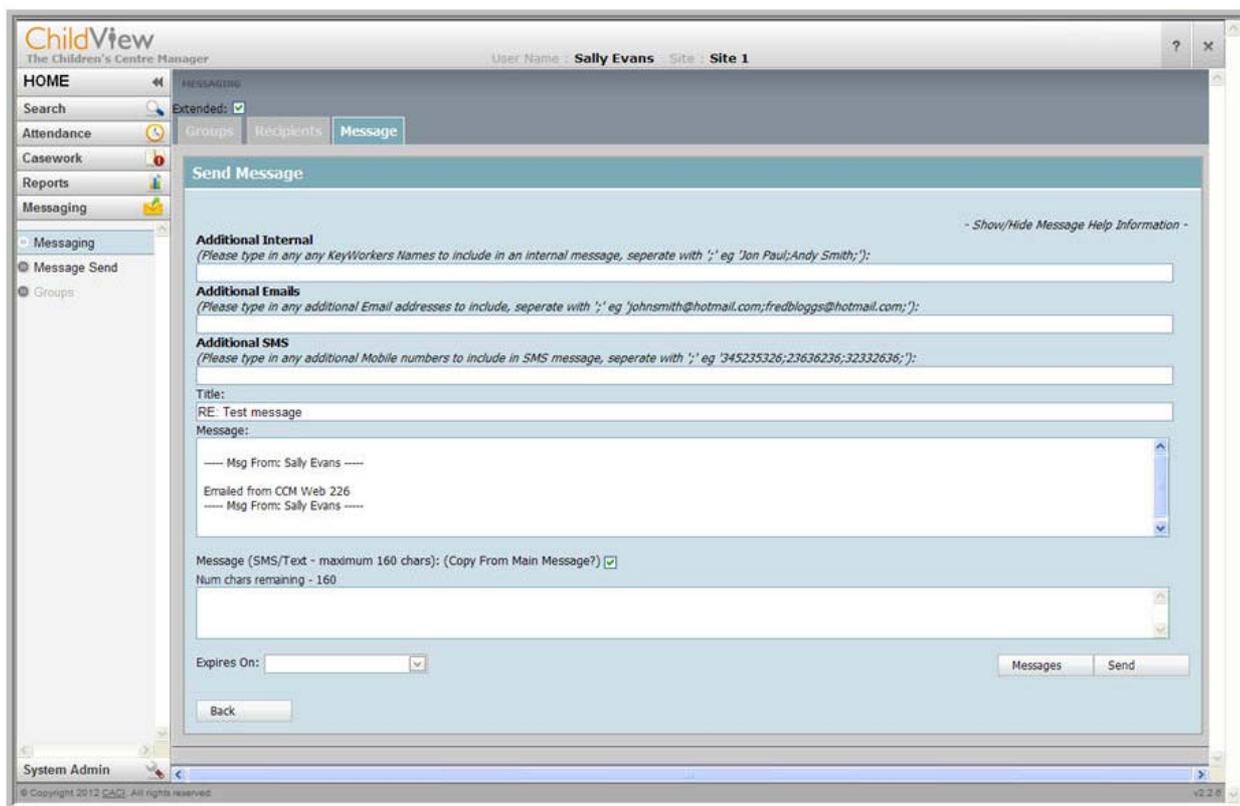
You can change the view of your Sent Items by selecting from the various message types and specifying a Date Range.

Select any item displayed in Sent Items to open the message and review the content, as illustrated in the example below:



Click 'Forward' or 'Forward All' to open the Message Send window with either a blank Recipients Tab ('Forward'), or the Recipients Tab pre-loaded with everyone that the message was sent to ('Forward All').

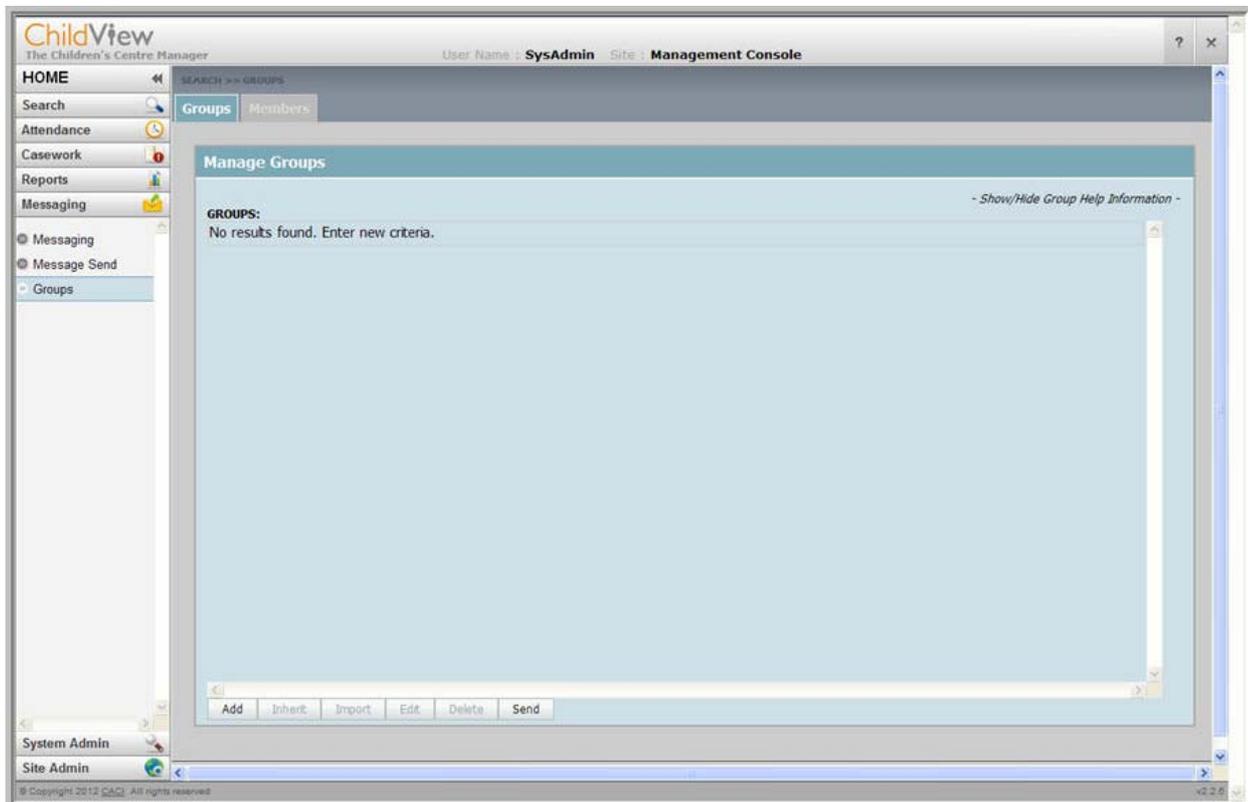
The following example shows the Message Send window opened by the 'Forward' button.



3.5. Creating groups for messaging

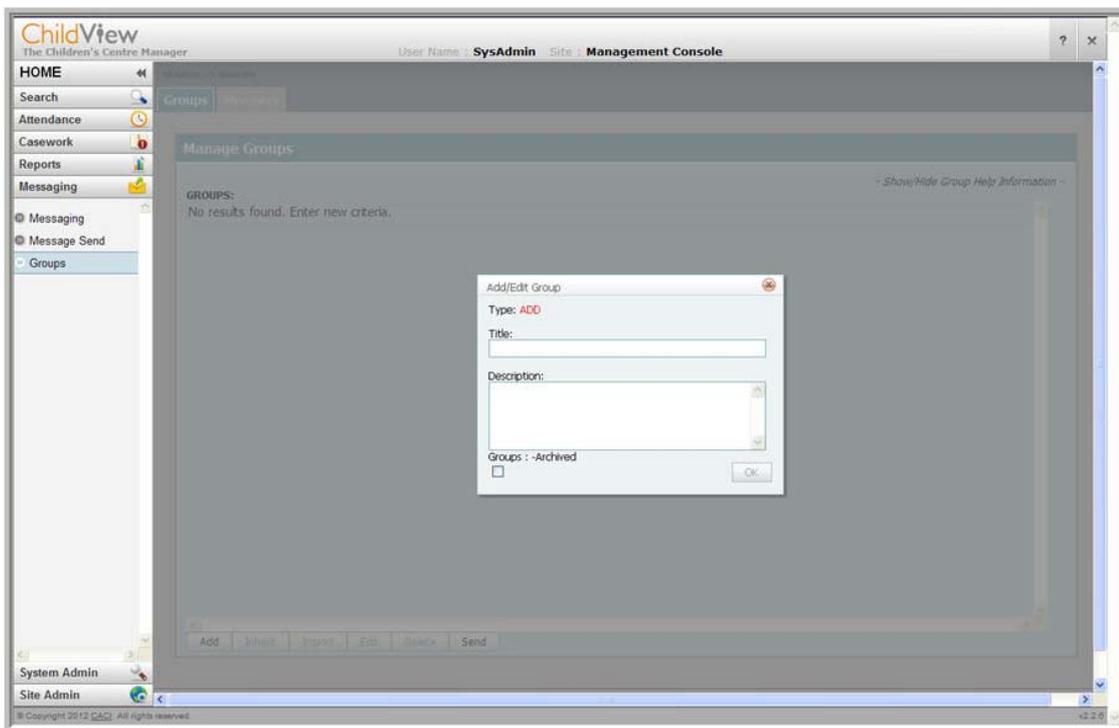
Groups can be created in the messaging system to speed up the selection of recipients. A Group can comprise a mixture of Key Workers and Individuals.

Press the 'Messaging' button in the side menu, then select the 'Groups' option. A screen similar to the following will be displayed:



3.5.1 Add a group

Press the 'Add' button to open the 'Add/Edit Group' window as illustrated below:



Enter a Group title and description and click 'OK' to create the Group.

3.5.2 Creating a group using the attendance review or the mail merge data extract

Once you have entered your parameters and generated a list of individuals in either the mail merge data extract or the attendance review, the list can be used to create a message group.

An important feature in CCM is the correspondee status box, which is shown in the information presented when you select the Personal menu option in the Individual Full Details screen. The presence, or not, of a tick in this box determines whether a record is included in a Mailing List Extract.

The correspondee field is used by all the mail options within the database to indicate which member of each household you would want to write to.

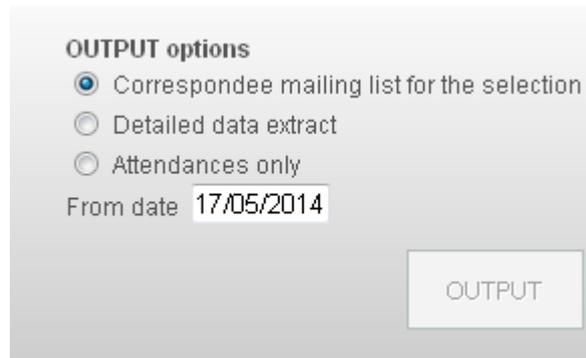
Note: The Correspondee box is ignored when a Detailed Data Extract is done, rather than a Mailing List.

The output button

The output options panel, at the top of the screen, lets you decide how to use the results from your filtered lists.

You can export information linked to the records contained within your search results in to Excel format.

Click on one of the output options, then click the output button (this is the button located to the right hand side of the output options).



OUTPUT options

Correspondee mailing list for the selection

Detailed data extract

Attendances only

From date 17/05/2014

OUTPUT

The output options are:

1. Correspondee mailing list for the selection

Use this option to create a list of all the nominated correspondees that are associated with the people on your list. If your list contains several children from the same family then the correspondee for that family will only be listed once (assuming only one correspondee status has been set. If multiple statuses have been set then each of these will be listed). Thus, you will see that the list of names making up the correspondee list will not be the same as the list shown in the search result section. This list of correspondee names and addresses can be sent to Excel and used as a mail merge data source for your letters or labels. The extract produced by the correspondee mailing list for the selection option only includes contact details.

2. Detailed data extract

The extract produced by the detailed data extract option includes most tick-boxes and data fields from a person's record. The names on the data list extracted will match those in your filtered list.

3. Attendances only

Choose a date from the drop down calendar, to be the starting point from when attendances are checked. This list will show only the attendance information attached to the names of the people in your filtered list – as such it is possible that the flags on an individual may be different at the time of attendance compared with when the list was created. For example the 'AT Parent' column in the resulting attendance list refers to status of the parent flag(s) when that individual attended the activity – not the status of

the parent flag(s) when the data extract was undertaken. The 'AT Parent' indicators are

0 = not a parent.

1 = is a parent.

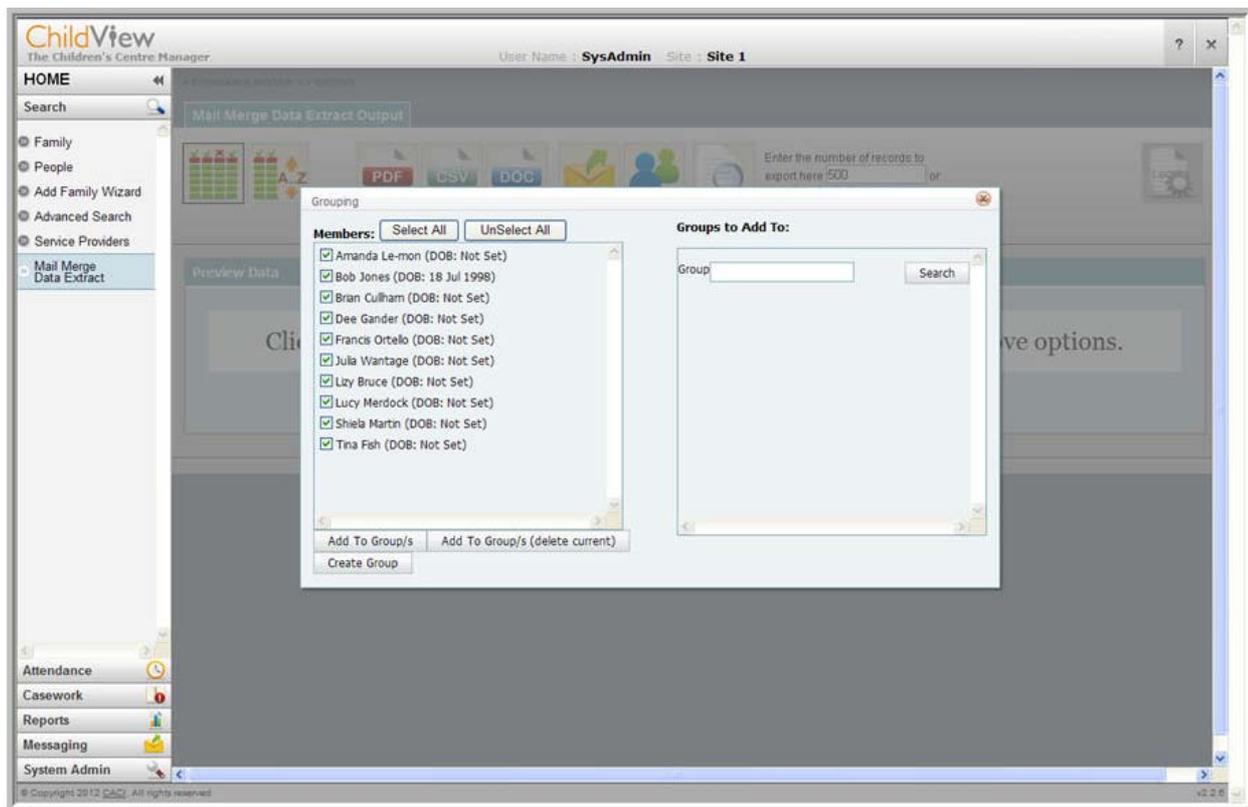
2 = is a lone parent.

Once the OUTPUT button has been clicked, you presented with the Data Pre-Extract Screen.



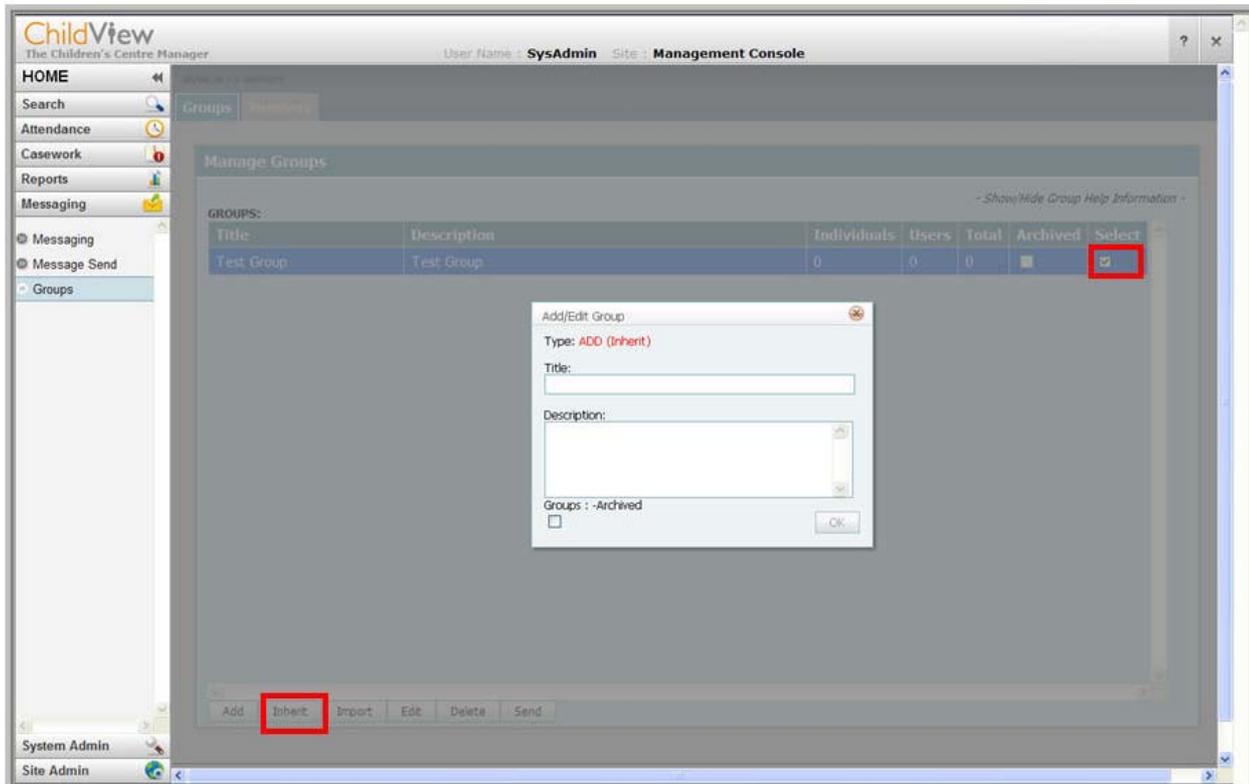
Selecting this icon in the data pre-extract screen will allow you to create a group from the selected individuals.

The grouping screen will open with options to add the selected individuals to an existing group or to create a new group with the selected individuals as members, up to a maximum of 500.



3.5.3 Inherit from a group

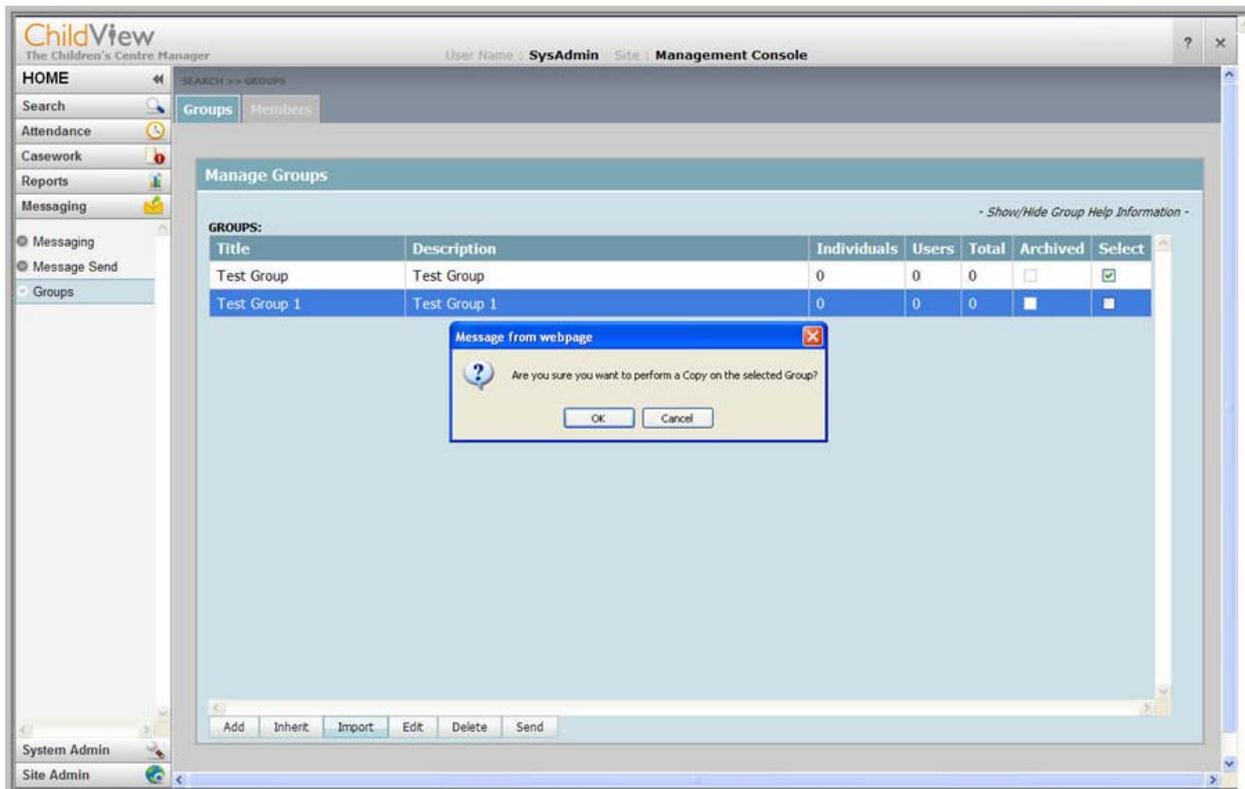
Select an existing Group by ticking the select box and press the 'Inherit' button to open the 'Add/Edit Group' screen with the 'Inherit' option as illustrated below.



Enter a title and description for the new Group then click 'OK' to create the new Group and add the members from the selected Group.

3.5.4 Import from a group

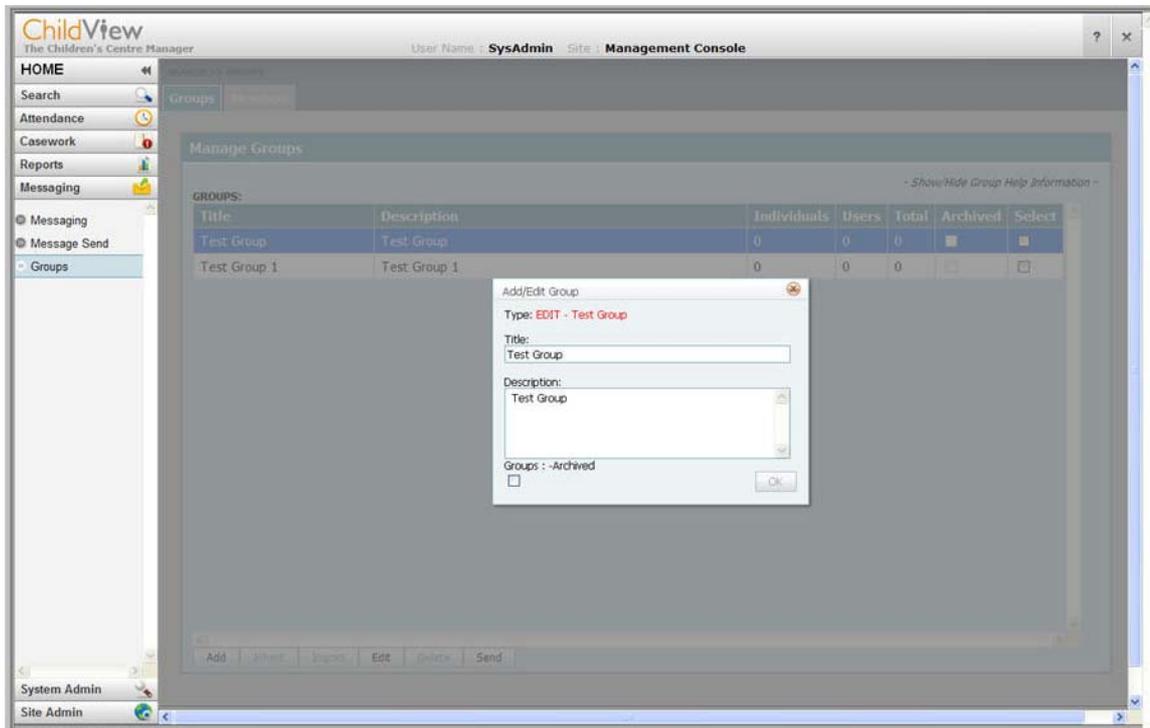
Select an existing Group by ticking the select box and highlight a target Group for the Import by clicking on the row. Press the 'Import' button to copy the members from the selected Group into the target Group, as illustrated below.



In the above example, the members of Test Group would be copied to Test Group 1. Click 'OK' to proceed with the copy.

3.5.5 Edit group details

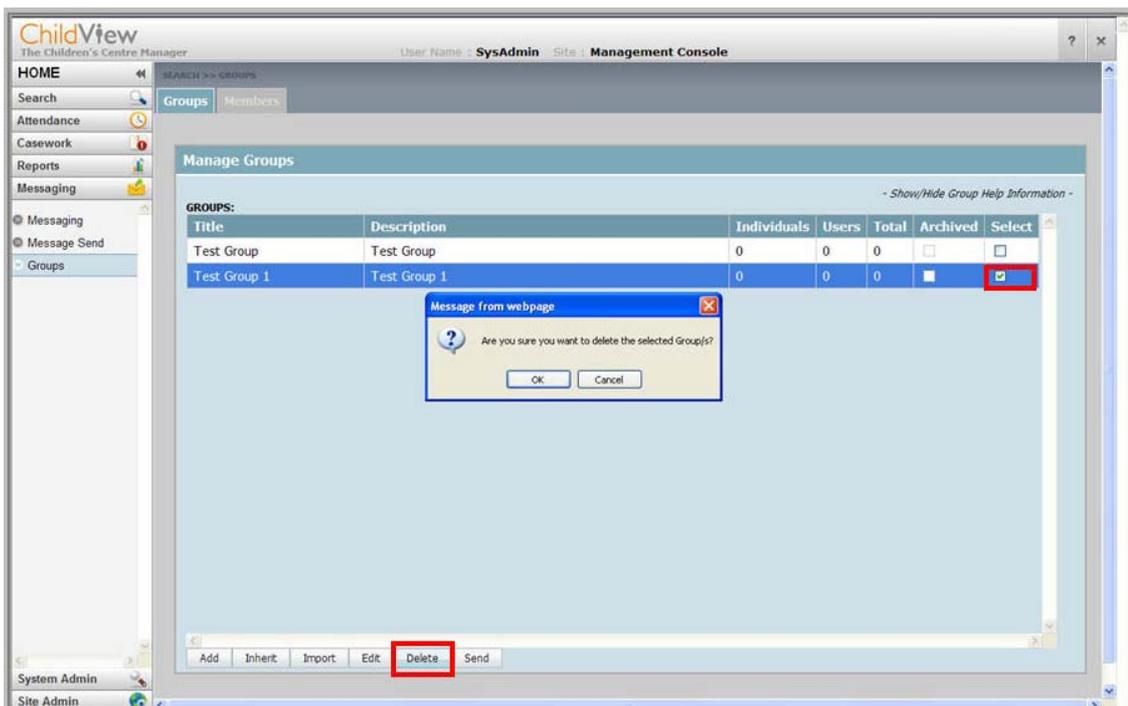
Highlight a Group by clicking on the row and press the 'Edit' button to open the 'Add/Edit Group' screen with the 'Edit' option as illustrated below:



Enter the required changes and click 'OK' to save the details.

3.5.6 Delete a group

Select the Group to be deleted by ticking the 'Select' box then press the 'Delete' button. A confirmation message will be displayed as illustrated below:



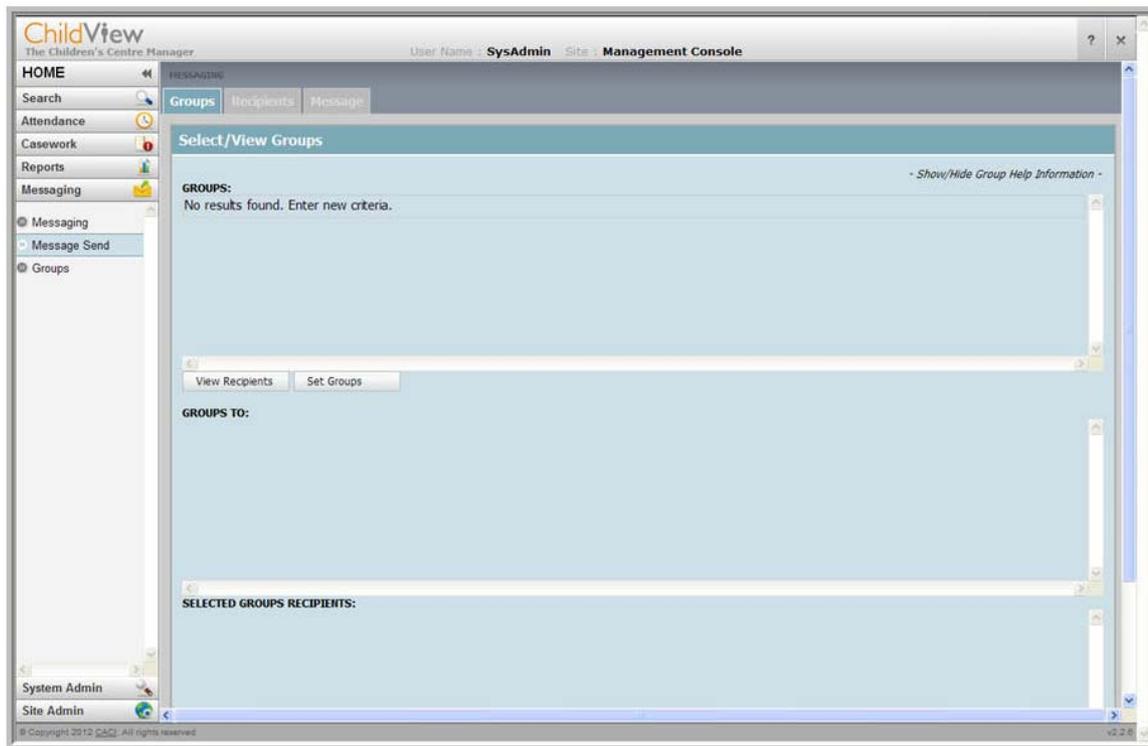
Click 'OK' to delete the selected Group.

3.5.7 Send to Group

Select a Group by ticking the 'Select' box then press the 'Send' button to open the 'Message Send' screen with the selected Group pre-loaded in the 'Groups To' area.

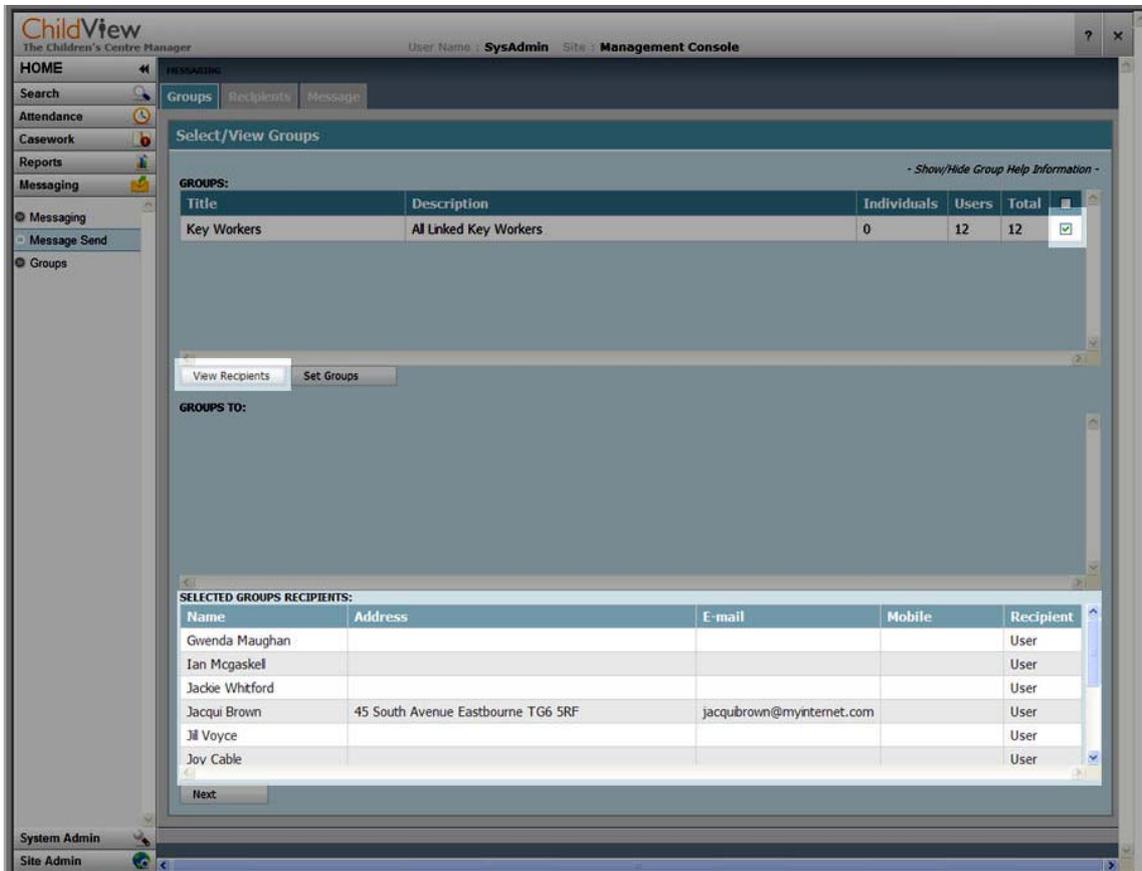
3.6. Message send

Press the 'Messaging' button in the side menu, then select the 'Message Send' option. A screen similar to the following will be displayed:

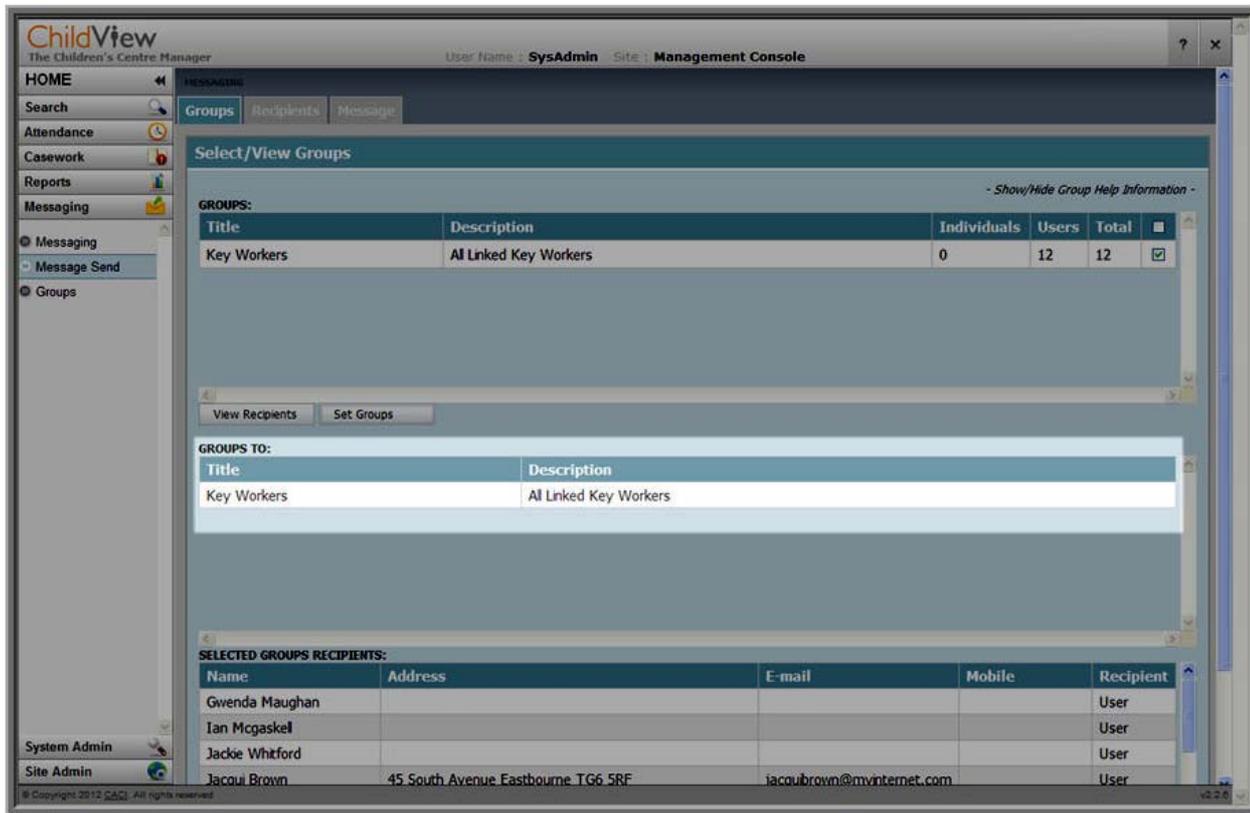


3.6.1 Groups

A message can be sent to one or more Groups, each Group comprising a mixture of Key Workers and Individuals. Group members can be view by selecting the Group and pressing the 'View Recipients' button as illustrated below:



Press 'Set Groups' to include all Group Members as Recipients. The selected Group(s) will then appear in the Groups to area:



Press 'Next' to move to the 'Recipients' tab, or click on the tab.

3.6.2 Recipients

Recipients can comprise one or more Groups combined with records selected individually from CCM users, individuals or key workers.

Start typing in the name of the individuals you wish to send a message to and a drop-down will appear with possible matches within the system.

The screenshot shows a web application interface for selecting recipients. At the top, there are tabs for 'Groups', 'Recipients', and 'Message'. Below the tabs is a header 'Select/View Recipients' and a link '- Show/Hide Recipient Help Information -'. A search field is labeled 'Enter 1st 3 chars of the Recipient's Name:' and contains the text '(NONE)'. To the right of the search field is a dropdown menu labeled 'Type:' with the value '(ALL)'. Below the search field is a dropdown menu labeled 'RECIPIENTS TO:' with the value '(NONE)'. Below the dropdown menu is a table with the following data:

	Name	Address					
			INDIVIDUAL - Dummy Child Record :(No Email)(No Mobile) C033556	I	E	T	In Group
			INDIVIDUAL - Dummy Record :(No Email)(No Mobile) R033555				
C033556	Dummy Child Record	4 North London Business Park, London, N11 1NP	11 Nov 2008	Individual			

At the bottom of the interface are two buttons: 'Back' and 'Next'.

Click 'Next' and you will be taken to the 'Message' tab (see section 3.4.3)

3.6.3 Message

Once you have selected either a group or an individual to send a message to the message can be written on this page.

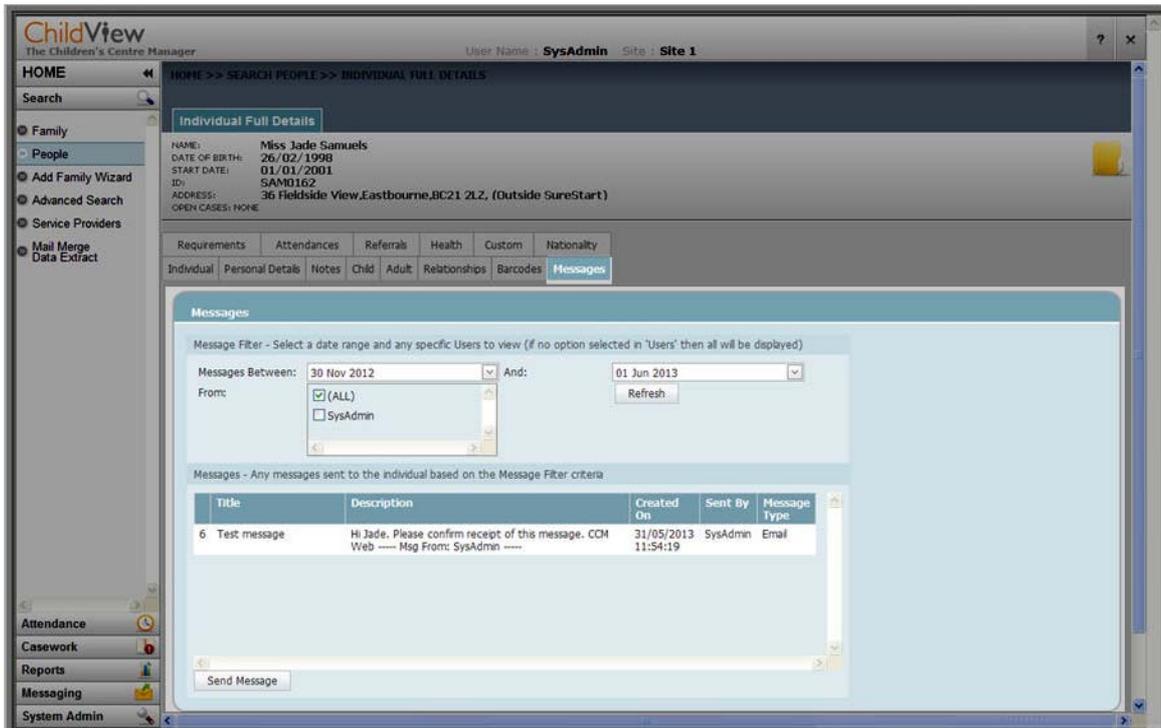
The screenshot shows the 'Send Message' form in the CCM messaging interface. The form is titled 'Send Message' and includes a 'Message Help Information' link. It contains several input fields for additional internal, email, and SMS recipients, a title field, a large message text area, a checkbox for 'Copy From Main Message?', a character count field for SMS/Text (160 characters), and an 'Expires On' dropdown menu. At the bottom, there are 'Back', 'Messages', and 'Send' buttons.

Best practice when sending messages:

- Always copy and paste in your email signature when sending messages via CCM
- Always include an opt-out statement (please refer to appendix 1 for guidance)
- Always include an email subject (recorded in the title field)
- Include a link to your activity timetable on Barnet Online.

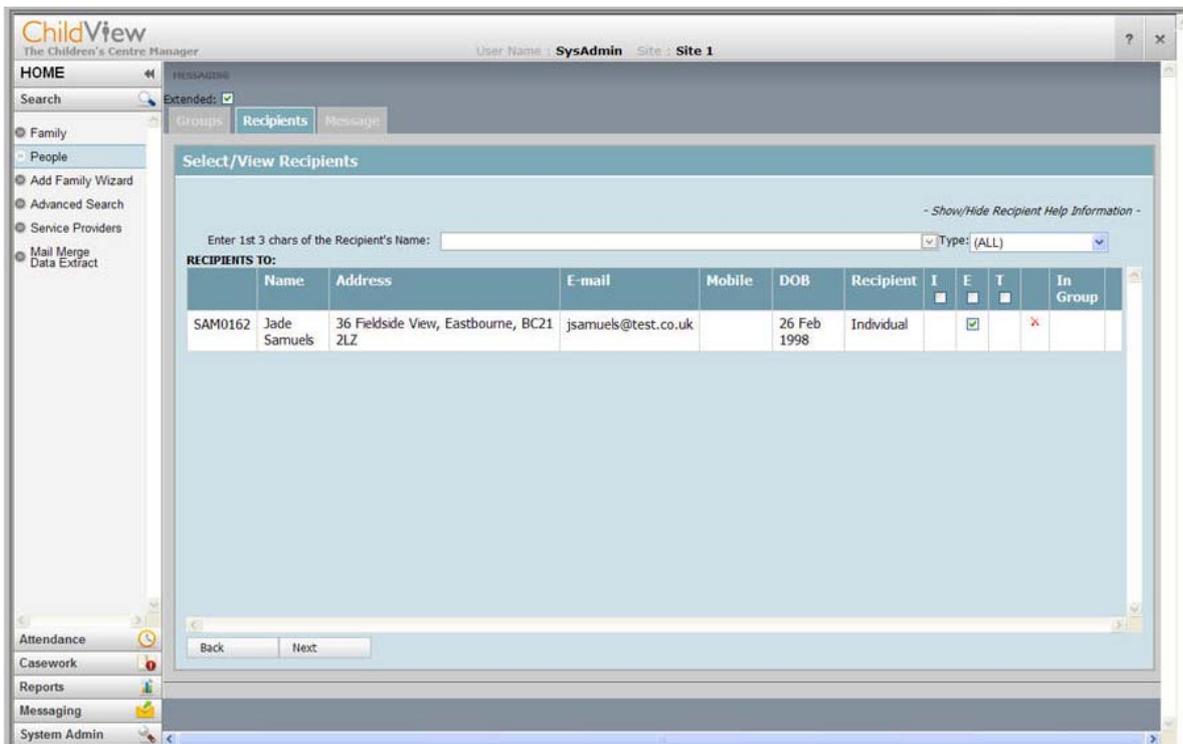
3.7. Messages tab within the individuals record

This tab enables you to see messages sent to an individual within a date range that defaults to the last six months.



The messages listed can be filtered by both date range and the sender. Press the 'Refresh' button to update the message display based on the modified filters.

Press the 'Send' button to create a new message to the selected individual.



CCM messaging acceptable use policy

London Borough of Barnet

Policy name	CCM Messaging Acceptable Use Policy		
Document description	Policy standards for the behaviour of Children's Centres using the messaging functionality on CCM.		
Document author 1) Team and 2) Officer and contact details	1) Data Systems and Assurance Team 2) Lauren Burbidge, lauren.burbidge@barnet.gov.uk , ext 7606		
Status (Live/ Draft/ Withdrawn)	Live	Version	1.0
Last Review Date	November 2014	Next Review Due Date	<i>April 2015</i>
Approval Chain	Paul Kennedy - Data Systems and Assurance Manager	Date Approved	<i>November 2014</i>

Version Control

(see the "Version Control and Naming Convention Guide" for details of how to complete this table using the council's preferred version control system)

Version number	Date	Author	Reason for New Version
1.0	<i>November 2014</i>	<i>Lauren Burbidge</i>	

Contents

1.	Introduction.....	1
2.	Access to CCM messaging	1
3.	The use of CCM messaging	1
3.1.	CCM messaging	1
3.2.	PECR and the DPA	2
3.2.1.	Privacy and Electronic Communications Regulations.....	2
3.2.2.	Data Protection Act.....	2
3.2.3.	Consent for messaging.....	3
3.3.	Acceptable use	4
3.4.	Unacceptable use.....	4
4.	Monitoring CCM messages	6
4.1.	CCM audits.....	6
5.	Monitoring CCM messages	6
5.1.	Best practice.....	6
5.2.	Opt-outs.....	6
5.3.	Dealing with sensitive subjects	7

1. Introduction

The CCM Messaging Acceptable Use Policy covers all communications (internal and external) undertaken using the CCM messaging facility. This includes but is not limited to:

- emails/text messages to children's centre service users
- emails/text messages to key workers or service providers
- internal messaging between CCM users.

This policy should be read in conjunction with the CCM Framework and Data Guidance documents.

This document outlines the expectations placed on children's centres in relation to their use of the CCM messaging functionality. The underlying philosophy is that the CCM messaging functionality should be used in a manner which is ethical, legal, and appropriate to children's centre aims. Message usage should not breach privacy laws, nor cause nuisance or distress to recipients.

It is important that children's centres have a clear understanding of the expectations that the local authority places on them and the standards to which they are expected to work.

2. Access to CCM messaging

No one may use CCM messaging without a valid CCM login. Please refer to section 2 of the CCM Framework for details on access for new users.

CCM users are given access to the messaging functionality if it is appropriate to their role. Managers must notify CCM Support of any change in staff duties which may affect their access and right to use the CCM messaging functionality.

3. The use of CCM messaging

3.1. CCM messaging

The CCM messaging functionality enables the sending and receipt of internal messages (via the CCM database) and external messages (via email and text).

Messaging enables communication between key workers, and that are involved with in terms of attendance sessions, referrals or casework. The system also enables ad-hoc email addresses and text details to be entered manually as message recipients.

The CCM messaging functionality includes the ability to create groups comprising a mixture of individuals, key workers who are linked to CCM users and key workers who are not CCM users.

Key workers who are not CCM users cannot receive internal messages as they have no access to the CCM database, but they can be included as email or text recipients.

3.2. Privacy and Electronic Communications Regulations and the Data Protection Act

When using CCM messaging, centres must comply with both the Data Protection Act 1998 (DPA) and the Privacy and Electronic Communications Regulations 2003 (PECR)¹.

3.2.1. Privacy and Electronic Communications Regulations

When sending direct marketing by electronic means, centres must always comply with the PECR.

The PECR is a law which makes it unlawful for you to send direct marketing to someone who has not specifically granted permission for you to do so via an opt-in agreement. You should not assume consent.

The PECR applies to all electronic communications, such as by telephone, fax, email, text, picture or video message, or by using an automated calling system.

Centres must immediately stop sending marketing messages to any person who objects or opts out of receiving them.

3.2.2. Data Protection Act

Section 11 of the DPA also gives individuals the right to prevent their personal data being processed for direct marketing. An individual can, at any time, give written notice to stop (or not to begin) using their details for direct marketing. In other words, centres must stop any marketing directed at a particular individual if that person writes and asks them to stop. The centre does not have to reply, but it is good practice to acknowledge the request and confirm that the marketing will stop. Any

¹ Information Commissioners Office: http://ico.org.uk/what_we_cover/legislation

requests of this nature must also be highlighted with the corporate Information Management Team for logging. These can be directed to data.protection@barnet.gov.uk

Much of the information held on CCM is confidential and must not be disclosed to other parties unless there is a clear legal basis to do so. Children's Centre Managers have a responsibility to safeguard the security of the electronic messages sent using CCM.

If personal data is accidentally lost, altered or disclosed, or someone accesses it or passes it on without proper authorisation, you need to notify CCM Support and the corporate IMT as per the council's Security and Data Incident Reporting Policy. CCM and IMT will offer further advice on what steps you need to take. Ensure you keep your own internal log of these incidents if and when they occur

Should CCM users be in any doubt about using CCM messaging or disclosing information, then they should seek advice from their manager. In addition, if CCM users are in doubt about whether an action might constitute unacceptable use, they should consult CCM Support. Please refer to section 3.4 on unacceptable use.

Further information about DPA can be found in section 3.2 of the CCM Framework.

3.2.3. Consent for messaging

The children's centre registration form states that once families are registered on our system (CCM) their details will be used to contact them. By completing the form, the family has provided consent.

Centres should keep clear records of what an individual has consented to, and when and how this consent was obtained, so that you can demonstrate compliance in the event of a complaint.

Where an individual has opted out of receiving marketing information, you must retain a clear audit trail of this notification to ensure they do not receive further information.

Consent to receive messages is captured on CCM in the individual's record. Please refer to section 3.1 of the CCM barcoding and messaging guidance document for further information.

3.3. Acceptable use

Centres should follow the below guidelines when using the CCM messaging functionality. This guidance is provided in addition to the councils Acceptable Use Policy:

Marketing messages

- Only send marketing texts or emails about activities or services that the family has expressed an interest in (this information is collected in section 9 of the registration form).
- Marketing texts/emails should only be sent to individuals living in the children's centre reach area.
- All marketing messages must include details of how to opt out of receiving future messages.

Changes to sessions

- Texts and emails should be sent to inform individuals of changes to sessions i.e. time changes, cancellations etc.

Messaging between users

- Messaging between CCM users must be in relation to information held on CCM.

Please note: all CCM support calls must be logged by email to ccm.support@barnet.gov.uk and not using CCM messaging.

The use of CCM messaging is intended for business reasons only.

3.4. Unacceptable use

Unacceptable behaviour in relation to the use of CCM messaging will not be tolerated and where it is identified a range of informal and formal routes may be followed. These include withdrawal of system access.

CCM users using the messaging functionality are expected to comply with the conditions of use which include the following.

Sending reminders

- CCM should not be used to send reminders about everyday sessions i.e. stay and play.

Requesting personal information

- CCM messaging should not be used to request personal information from individuals. For example, ethnicity, language etc.

Personal use

- Personal use of the CCM messaging functionality is not acceptable. Monitoring of individual usage of CCM messaging will not be undertaken as a matter of course. However, this may be necessary when concerns arise about the level or nature of personal use of the systems. Withdrawal of access from the system may be considered appropriate in such circumstances.

Consent

- Children's centres must not send marketing texts or emails to individuals without their specific prior consent. This relates to new birth families in particular who have not yet registered with the centre.

Some forms of behaviour will always be considered to fall below the standard of acceptability. These include:

- the use of inappropriate language in communications
- sending inappropriate messages including those which are discriminatory, sexually harassing or offensive to others on the grounds of race, age, disability, gender, religion or sexual orientation
- the sending of potentially defamatory messages which criticise other individuals or organisations (legally email is classified as a form of publication, governed by the rules of disclosure, libel and employment law)
- forwarding confidential, sensitive or personal information onto third parties without gaining appropriate consent
- overloading the system by sending inappropriate bulk messages
- sending messages which are rude, overbearing, aggressive or bullying.

4. Monitoring CCM messages

Monitoring of individual usage of CCM messaging will not be undertaken as a matter of course. However, this may be necessary when concerns arise.

Withdrawal of access from the system may be considered appropriate in some circumstances.

4.1. CCM audits

CCM audits can take place at any time and will be undertaken by the Early Years Team and/or the Data Systems and Assurance Team. The lead officer for the audit will ensure compliance with this policy as well as the CCM Framework, DPA and PECR.

For further information about CCM audits please refer to section 4 of the CCM Framework.

5. Monitoring CCM messages

5.1. Best practice

Emails and text messages can be used for different types of communication and can constitute a formal record of proceedings.

The types of communication which email and text messages can be used for include general business discussions, disseminating information, agreement to proceed and confirmation of decisions made.

Although email and text messages can be used for these types of communication, it may be necessary to consider whether the sensitivity of the information would be more appropriately communicated in a different way.

Dealing with sensitive subjects in email and text messages is addressed in more detail below. It should also be noted that there are certain subjects that should be avoided in email and text messages as they could be construed as discriminatory; this is covered in more detail in the section on email misuse.

5.2. Opt-outs

All emails and text messages sent must include an opt-out of receiving future promotional messages.

Suggested text to use in emails:

You may unsubscribe to children's centre communications by responding 'STOP' or 'STOP keyword' to this email.

Example: Respond to this email with the words "STOP CHILDCARE" to opt-out and stop all future messages about childcare. To remove yourself from all campaigns, respond STOP ALL to this email.

5.3. Dealing with sensitive subjects

The privacy and confidentiality of the messages sent via CCM cannot be guaranteed.

CCM should not be used to send information of a sensitive nature.

Sensitive information can include information about specific individuals, groups or activities.

It is the responsibility of all users to exercise their judgement about the appropriateness of using CCM to send messages when dealing with sensitive subjects.

All employees, Council Members, and partner organisations (suppliers and contractors) that have access to council systems or to personal data held by or on behalf of the council are responsible for ensuring that no security breaches occur as a result of their actions. Everyone must be aware of their responsibility to report any potential, suspected or actual data security incidents to CCM Support and data.protection@barnet.gov.uk.

Appendix 2: CCM barcoding and messaging FAQs

Barcoding

Q: Are barcodes automatically assigned to individuals when they are first registered on CCM?

A: No, this is done by CCM Support at least every 2 working days.

Q: Does the barcode scanner automatically update CCM?

A: No, data collected using the barcode scanner has to be downloaded using the CCM barcode logger application, and then uploaded in to CCM. Please refer to sections 2.7 and 2.8 of the guidance for details on how to carry out this process.

Q: Does the barcode scanner hold any sensitive data?

A: No, the barcode scanner only holds the barcode i.e. the individual or session identifier. Until this has been loaded into CCM individuals cannot be identified with the data collected by the scanner.

Q: If I lose the barcode scanner will I lose all of the attendances it has recorded?

A: Yes, the data collected on the scanner does not automatically load on to CCM; this has to be done manually.

Q: How often should I load data from the barcode scanner in to CCM?

A: Ideally this should be done every day, but it should never be longer than 3 working days.

Q: Do we still need to use a sign-in sheet if we are using barcoding?

A: We would advise you to continue to use a sign in sheet in case individuals are attending the centre for the first time and do not have a membership card, or for people that have forgotten their membership card. Appendix 3 is an example sign in sheet that can be used. We would suggest having a tick box to record if the attendees have a membership card or not, so that you can quickly see who needs to be added on to CCM manually.

Q: If there is a fire can we quickly print the list of attendees from the scanner?

A: No, in the case of a fire we do not advise that this should be done. We would suggest that you keep a sign-in sheet in case of emergencies (see above question).

Q: How often should we produce membership cards for newly registered families?

A: We would suggest producing membership cards for all newly registered families at the end of each week.

Q: When should we input session details to produce session lists?

A: We would advise setting up all sessions for the coming week on a Friday.

Messaging

Q: Who can see message groups that I have created?

A: All CCM users can see any groups that have been created on the system regardless of the centre they are logged in as.

Q: Can email recipients see the email addresses of all other recipients?

A: No, all recipients are blind copied into emails.

Q: Can I send attachments with emails?

A: No, CCM does not allow for attachments to be sent with emails. If you would like to send copies of your timetable with emails you could send the link to your timetable on Barnet Online.

Q: How do I know if we have consent to send messages to families?

A: Consent for messaging is stored on the individual's record in the personal details tab in a box called 'non CC mailshots'. When creating messaging groups using the mail merge data extract or the attendance review, 'non CC mailshots' must be selected as a parameter.

Q: If someone opts out of receiving messages how do I record this?

A: To remove consent from an individual or family record you should un-tick the consent to non CC mailshots for each individual family member. You can also add an extended note to the individual's record to keep a record of this.

Q: If an email sent through CCM bounces back, where does it go?

A: The bounce back email will return to the CCM user who sent the email via their Outlook account.

Q: If someone responds to a CCM email, where does it go?

A: The response will return to the CCM user who sent the email via their Outlook account.

