

Children's Centre Management Information System; CCM

Basic Guide to CCM

Document history

Version	Date	Owner	Position	Comments
1.0.	April 2013	Lauren Burbidge	Data Quality Officer	Upgrade to CCM
2.0.	April 2014	Lauren Burbidge	Data Quality Officer	Rewrite: Update to 2.2.9

Contents

Section 1: Getting started

1. Introduction.....	4
2. General Information.....	4
3. Logging on for the first time.....	5
4. Homepage.....	7

Section 2: Search menu

1. Searching.....	10
2. Family Search.....	11
3. Moving a family address.....	22
4. People search.....	23

Section 3: Attendance Menu

1. Attendance Overview.....	43
-----------------------------	----

Section 4: Individual full details

1. Individual full details.....	69
---------------------------------	----

Section 5: Archiving

1. Archiving Introduction.....	91
2. Selecting non-archived and archived records.....	92
3. Moving families in and out of the archives.....	92

Section 6: Referrals System

1. Viewing referrals for an individual.....	96
2. Viewing referrals for a family.....	96
3. Adding referrals.....	97
4. Editing referrals.....	99
5. Recording outcomes.....	100
6. Referrals reports.....	102

Section 1: Getting started

1. Introduction

The basic user guide is aimed at hands-on first time users of CCM that will be inputting data to the system.

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
CCM guide to performance reporting	<ul style="list-style-type: none"> Children's Centre management team CCM Superusers
CCM guide to recording Casework	<ul style="list-style-type: none"> Children's Centre management team Family Support Workers CCM Superusers

This guide details the facilities that are currently available (version 2.2.9).

Access to everything described in this guide is dependent upon the permissions for your user profile being set at a high enough level to 'see' all areas. If your user profile does not allow you to carry out some of the tasks described, you will need to contact ccm.support@barnet.gov.uk.

2. General information

Families

Families are classed as those individuals who live at an address in the database. If somebody was to live at a different address (even if they were related) then this would be classed as two separate families.

Maximising screen space

To maximise the amount of screen space available, CACI recommends that users press the F11 key when using Internet Explorer.

Internet Explorer

Internet Explorer version 8 in Compatibility View is recommended for CCM.

3. Logging on for the first time

Access to the Children Centre Manager database is through your internet browser.

The web address for CCM is: <https://barnetccm.org.uk/ccmweblive>

Please note: The recommended browser is Internet Explorer 8

Once you have connected to the database, you will need to sign on using the username and password given to you by CCM Support.

You should see a log on screen similar to that shown below:

The image shows a web-based login interface for the Children's Centre Manager (CCM). At the top, there is a header bar with the text "CCM Login" on the left and "v2.2.8" on the right. Below the header, there are two input fields: "USERNAME" and "PASSWORD". To the right of each label is a white rectangular input box. Below the password field, there are two buttons: a blue "Login" button and a blue "Change Password" button. At the bottom of the login box, there is a logo for "ChildView" in orange and grey text.

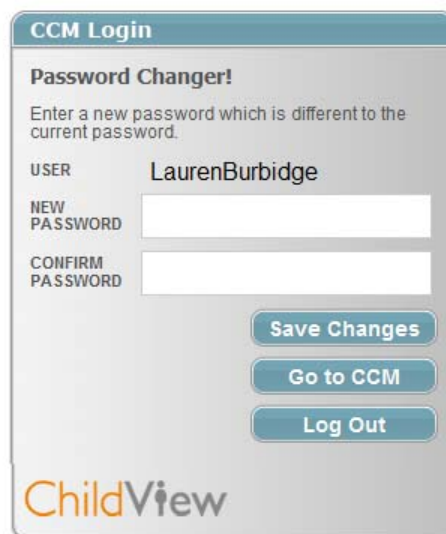
Welcome

To login you must have a valid username and password
for the Children's Centre Manager application.
Please contact your system administrator if you do not have this.

EMAIL: essupport@caci.co.uk

2.1 Changing your password

1. Click in the username field and type in the username provided by CCM Support. The field is case insensitive.
2. Click in the password field and type in the password provided by CCM Support.
3. Click the change password button.
4. You should see a log on screen similar to that shown below



The screenshot shows a web form titled "CCM Login" with a sub-header "Password Changer!". Below the sub-header is a instruction: "Enter a new password which is different to the current password." The form contains three input fields: "USER" with the value "LaurenBurbidge", "NEW PASSWORD", and "CONFIRM PASSWORD". To the right of these fields are three buttons: "Save Changes", "Go to CCM", and "Log Out". The "ChildView" logo is at the bottom left of the form.

Welcome

To login you must have a valid username and password
for the Children's Centre Manager application.
Please contact your system administrator if you do not have this.
EMAIL: essupport@caci.co.uk

5. Type in your new password in the new password field and repeat in the confirm password field.
6. Click the save changes button.

Note: For security purposes you should change your password the first time that you log in.

Once you have changed your password you can log in to the system by clicking the login button.

4. Home page

The home page has five sections:

- Messages
- Birthdays
- Cases
- Sessions
- Families

4.1. Messages

In Barnet we are not currently using the messaging functionality, but will start using this in summer 2014.

4.2. Birthdays

The birthdays section of the home page lists individuals whose birthday is today.

Click on a row to open the Individual Full Details screen.

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Management Console

HOME

Search

Messages Birthdays Referrals Cases Sessions Families

Click on a summary item to bring details into view

Birthdays

Individuals Birthday Today - Select an Individual to go to their details

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

Individuals with a Birthday today

Referrals

Individuals with Outstanding Referrals - Select an Individual to go to their details

No results found. Enter new criteria.

Attendance Casework Reports Messaging System Admin Site Admin

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4.3. Referrals

The referrals section of the home page lists individuals who have an open referral to a key worker, an activity or a service.

The screenshot shows the 'Referrals' section of the ChildView interface. At the top, there are summary boxes for Messages (1), Birthdays (1), Referrals (1), Cases (1), Sessions (0), and Families (0). The main content area is titled 'Referrals' and includes a sub-header 'Individuals with Outstanding Referrals - Select an Individual to go to their details'. Below this is a table with the following data:

Identifier	ForeName	Surname	House Name	Address	Street Name	Town Name	Area	Referred By	Referred To	Activity	Service
L00429	Tiger	Trees	6		Barckam Road	Eastbourne	West Side	Joy Cable	Jill Voyce		

Below the table, there are filters for 'Referred To Jill Voyce' and 'Referred By Jill Voyce'. The bottom section of the screenshot shows the 'Cases' section with a table of outstanding cases.

Case	Opened	Due
Simpson Family	02-Oct-2006	02-Apr-2007

4.4. Cases

The cases section of the home page lists open cases within the current site. When the logged in user is linked to a key worker record the list is restricted to cases which involve the key worker.

The screenshot shows the 'Cases' section of the ChildView interface. At the top, there are summary boxes for Messages (1), Birthdays (1), Referrals (1), Cases (1), Sessions (2), and Families (1). The main content area is titled 'Cases' and includes a sub-header 'Outstanding Cases - Select a case to go to the related details page'. Below this is a table with the following data:

Case	Opened	Due
Case 1	12-Apr-2010	12-Jul-2012

Below the table, there are filters for 'Outstanding Cases'. The bottom section of the screenshot shows the 'Sessions' section with a table of today's sessions.

Session	Location	Count	Site
Food for Life	Food for Life (Clients Home)	0	Site 1
Play and Stay	Play and Stay (Community Centre)	0	Site 1

4.5. Sessions

The sessions section of the home page lists sessions scheduled for today within the current site or all sites depending on the users permissions.

Sessions

Today's Sessions - Select a Session within the current Site to open the Attendance Input

Activity	Session Name	Start Time	Stop Time	Bookings	Attendees	Site
Food for Life	Food for Life (Clents Home)			0	0	Site 1
Play and Stay	Play and Stay (Community Centre)			0	0	Site 1

Below the table is a button labeled "Sessions today".

At the bottom of the page is a section titled "My Supported Families" with a sub-section "Individuals" and a button "List Related Individuals". Below this, it says "No results found. Enter new criteria."

4.6. Families

When the logged in user is linked to a Key Worker record, the number of families currently supported by the Key Worker will be displayed.

Families

Below the navigation bar is a button labeled "All KeyWorkers".

My Supported Families

Individuals List Related Individuals List Related Individuals Past Relationships: ☐

Identifier	Name	Surname	Age	Address	DOB	Start Date	End Date	Profession
T00441	Ryan	Taylor	21	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	15-07-1992	19-12-2013		Carer
T00442	Jenna	Taylor	21	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	15-07-1992	19-12-2013		Carer
W00486	Fleur	Weller	8	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	10-11-2005	19-12-2013		Carer
W00440	Alison	Weller	42	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	11-03-1971	19-12-2013		Carer
WEL0043	Adam	Weller	46	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	07-04-1967	19-12-2013		Carer

Section 2: Search menu

1. Searching

Before loading any data into CCM, search for **ALL** family members.

Do not assume that if the parent/carer is not on the system that the child will not be.

The system will host 'archived families' who previously registered with the centre but are no longer accessing services. To avoid creating duplicate families in the database it is important that all centres search both active and archived families before entering data into the system.

There are two different searches that can be performed:

1. Family search
2. People search

You will find these options listed in the search menu at the top left of the screen.

The search menu contains the starting point for finding families/ people and for adding families / people in to the database.

For day-to-day use of the database, it is likely to be the area that you use the most.

Please refer to the searching protocols detailed in section 4 of the CCM Data Guidance.

2. Family Search

Selecting the family menu option allows you to undertake a search to return a list of addresses. You can then modify information about the selected address / view individuals as required.

In the first instance just click the 'Search' button located towards the top right of the screen:

Family Search

The **Family Search** page can be used to find Families and Individuals by their name or address.

To find an Individual by their name, select **Name** in the **Search For** drop-down above. To find an Individual or Family by Address, ensure the **Search For** drop-down has **Address** selected. With the relevant permissions further criteria can be performed, limiting the Addresses returned by the **Site** currently being accessed and whether the Addresses are **Archived** or **Occupied**.

After a Search has been performed the results can be reduced further by using **Column filtering**. Column filtering occurs automatically once the page identifies you have made a change.

The **Address**, **Town**, **Post Code** and **Area** columns allow you to filter the results by supplying information in the Text Boxes just below the Column Header. The **Town**, **Post Code** and **Area** columns also allow you to filter the results by the common values found in the search. Simply click the down arrow in the Column's title.

Results can be sorted by clicking on the Title text of any column.

Remember: Always set the 'occupied', 'archived' and 'sites' drop-downs to 'all' so that archived individuals are returned in your search.

If the individual or addresses you are searching for is in the database, you should now see a grid of addresses shown on the screen:

	Address	Town	Post Code	Area
NIC	Cold Comfort Farm Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
	1 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
N	123 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
N	15 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
N	3 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart

Page 1 of 20 (97 items)

Please refer to Section 2: Search Menu, section 5 about 'Add family wizard' If the address or individual is not returned in the search.

Clicking on one of the addresses will then show you a grid containing all the people who are registered to be living at that address:

The screenshot shows the ChildView software interface. The top bar displays 'ChildView The Children's Centre Manager' and 'User Name : SysAdmin Site : Site 1'. The left sidebar contains navigation links: HOME, Search, Family, People, Add Family Wizard, Advanced Search, Service Providers, Mail Merge, and Data Extract. The main area is titled 'Search for a Family' and contains a search bar and a table of results. Below the search bar, there is a table with columns: Address, Town, Post Code, and Area. The table lists several addresses, with the last one, '3 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)', highlighted. Below this table, there is a section titled '2 found' which contains a table of people found at the selected address. This table has columns: Forename, Surname, DOB, Age, Identifier, and Address. It lists two people: Dors Howe and Mary Howe.

Address	Town	Post Code	Area
Cold Comfort Farm Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
1 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
123 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
15 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
3 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart

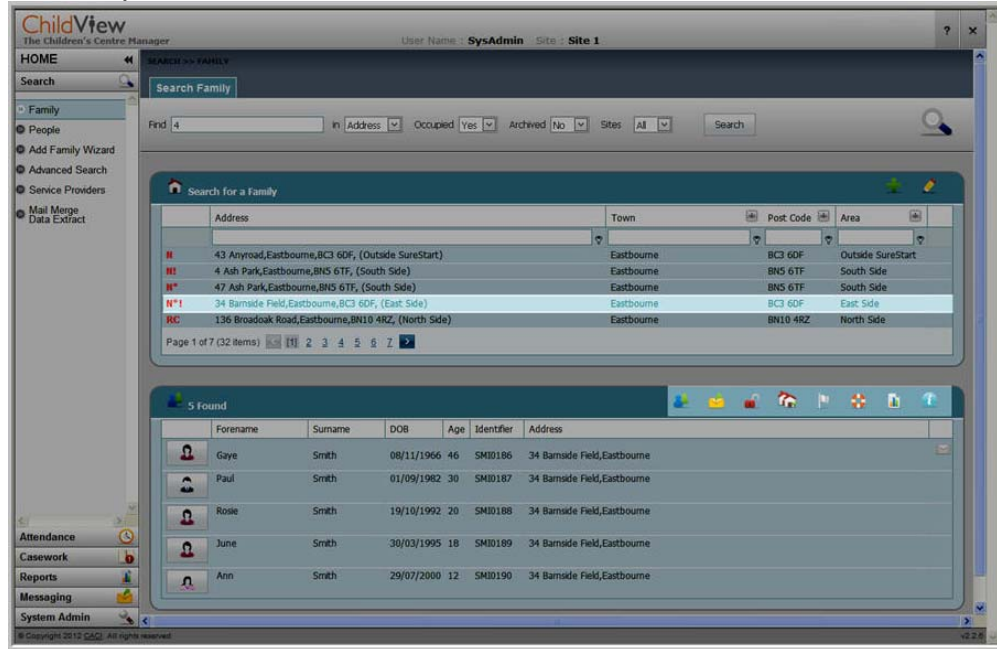
Page 1 of 20 (97 items)

Forename	Surname	DOB	Age	Identifier	Address
Dors	Howe	10/01/1974	39	HOW0176	3 Anyroad, Eastbourne
Mary	Howe	05/05/2005	8	H00457	3 Anyroad, Eastbourne

Clicking on one of the people icons to the left of the forename column will then launch that person's individual full details screen where you can view or edit their details as needed.


2.1 Address based operations

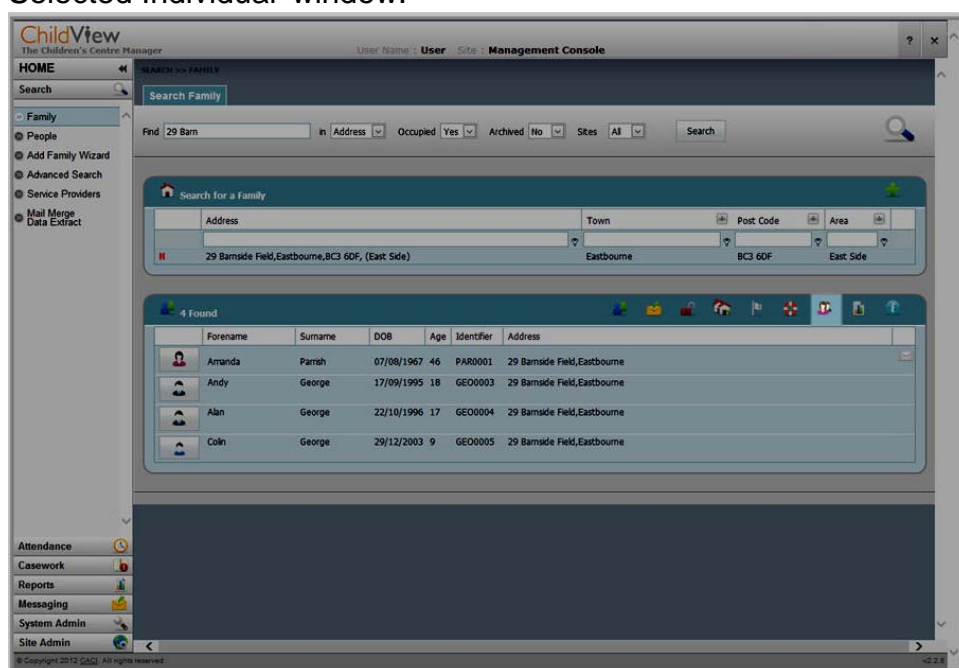
Once an address has been selected then those individuals registered at that address will be shown in a separate result grid at the bottom of the screen. At the top of this grid are a number of icons that allow you to undertake address based operations:




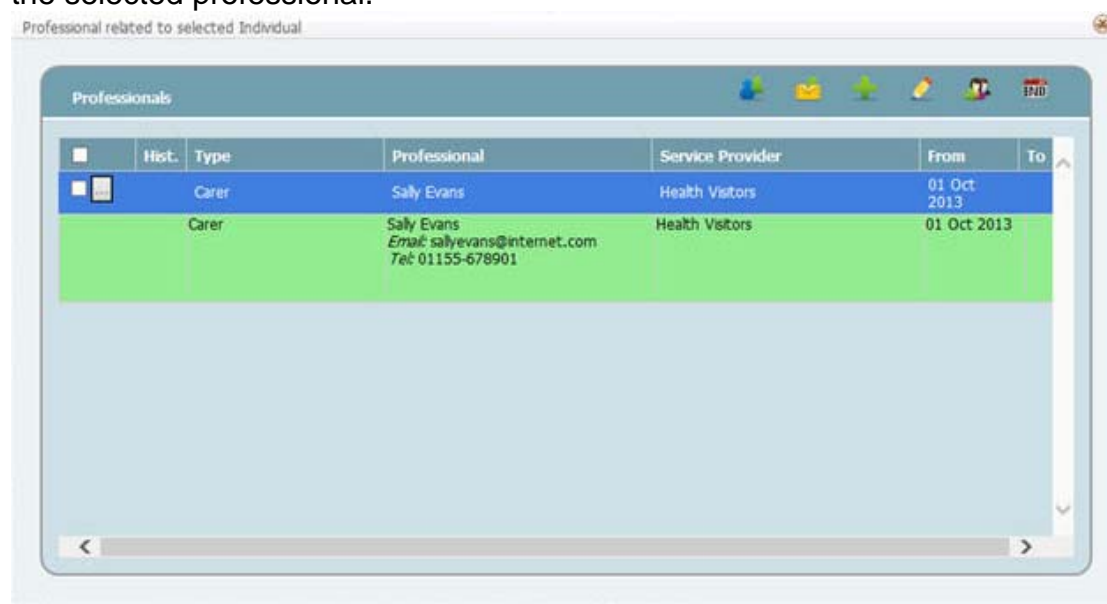
2.1.2. Maintain professionals involved

Family Search includes the functionality to maintain professional relationships for all individuals within the selected address. Click the individual row to select

an individual, then click the  icon to open the 'Professionals Related to Selected Individual' window.



The 'Professional Related to selected Individual' window will list any existing professional relationships. Clicking the  icon will display more details for the selected professional.



Professional relationships could include the following:

- Family Support Worker
- Midwife
- GP
- Health Visitor
- Social Worker
- School



Click to add a new professional relationship.



Click to edit an existing professional relationship (option only available when a row is selected).



Click to Add and Replace an existing professional relationship (option only available when a row is selected).



Click to end an existing professional relationship (option only available when a row is selected).

Colour Codes used in the 'Professional Related to Selected Individual' window.

Blue - The row is selected

Grey - indicates historic information

White - The relationship is current


Yellow - indicates a relationship which has ended and with no replacement professional.


Green - Indicates further level of detail for the preceding row.

Please refer to Section 2: Search menu, section 6.6 on adding/editing professional relationships.

2.1.3. Archiving / Unarchiving addresses

If none of the family members is currently relevant to your database (for example, if there are no children within the required age range), you can Archive the family. This means the address and its occupiers will be moved to the Archive area of the database. This ensures all the historical information concerning attendances is still held in the database. That information will still be used in retrospective reports, but the family unit and the address are no longer visible when you use the database in its default, current settings.

To archive a family, click on the open padlock icon () shown in the people grid. Note: Any archived addresses will have a red 'A' located to the right of the address details in the address search result grid.


Click the closed padlock icon () if you need to reinstate the family in the active, current view of the database (for example if the family has had a new baby).

Further information about this subject can be found in Section 5: Archiving.

2.1.4. Move address



When you press this icon, you'll be asked to confirm that you proceed with an

Address Move. Pressing the asterisk icon () will return you to the search screen.

Pressing Ok will present you with a screen similar to the following that allows you to move family members from one address to another.

Please refer to Section 2: Search Menu, section 3 on moving a family address.

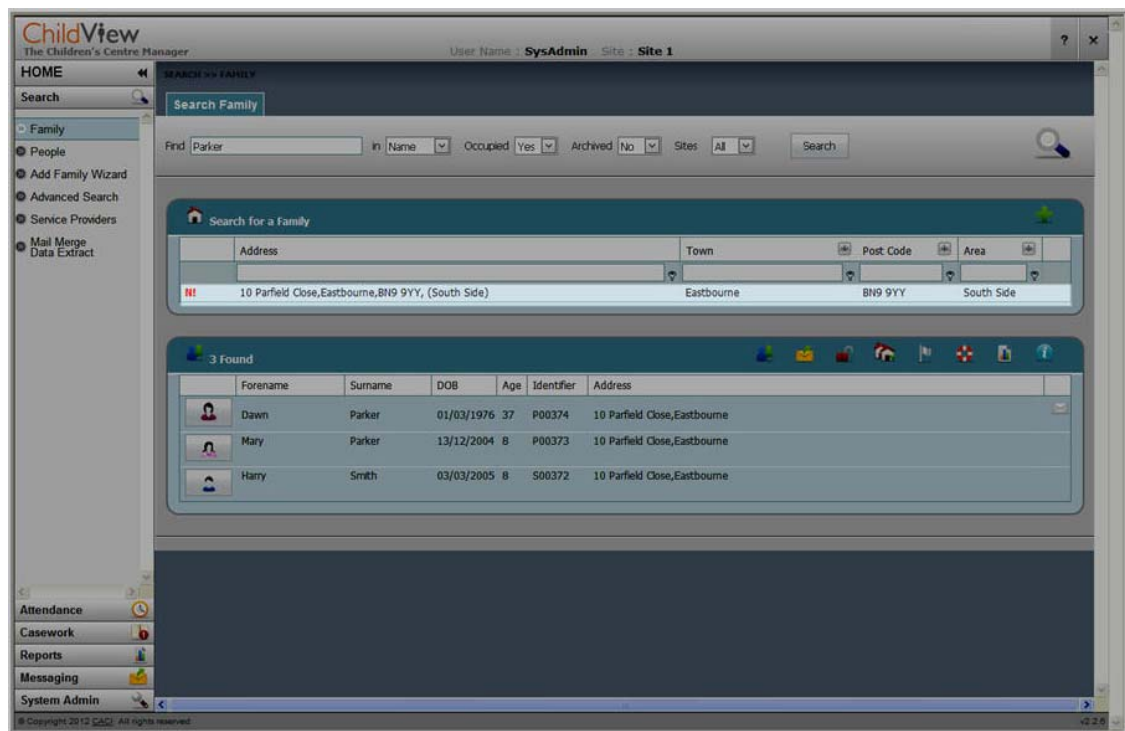
2.1.5. Family indicators



icon.

The Indicators are an alert, especially to Family Support Outreach Workers, who may visit clients at their homes.

When you use the Family search screen any addresses returned that have an indicator will have a ! status indicator against them. For example:



To see the indicators associated with the family press the Family Indicators icon that will be located in the grid showing individuals who live at the selected address. A screen similar to the following will show:



From the Family Indicator screen you can create new indicators or edit existing indicators that are applicable to the whole family.

Adding a new family indicator

To add a new indicator click on the  icon to open the Add new Family Indicator screen:



Select the applicable indicator description from the drop down list. If required you can now add an additional note or change the status of the indicator by ticking or un-ticking the active check box.

The following family indicators can be added to a family record:

*TF: Troubled Family	V: History of violence
AD: Aggressive dog	RTN: Refer to notes
VP: Visit in pairs	TFR: Top floor residence, no lift
DP: Dangerous/large pet	TR: Translator required
D: Deaf – unable to use voice telephone	*PP: Parent/carer in custody
OS: Family has received outreach services	*DV: History of domestic violence
	SF: Known to Safer Families
*DA: History of drug/alcohol abuse in the home	SC: Known to Social Care

*these family indicators link to performance targets and reports.

Click the 'Save' button to commit any change to the database.



Click the icon at the top of the screen to return to the Family or People Search screen.

Modifying an existing Family Indicator

If you need to modify an existing Family Indicator click on the relevant row in the Family Indicators screen to highlight it. The edit icon will now be visible on the screen:



Clicking this icon will open a dialog box where you can change the note details or tick / un-tick the active status check box.

Click the 'Save' button to commit any change to the database.



Click the icon at the top of the screen to return to the Family or People Search screen.

2.1.6. Support workers



icon.

This function has now been superseded by professional involvements.

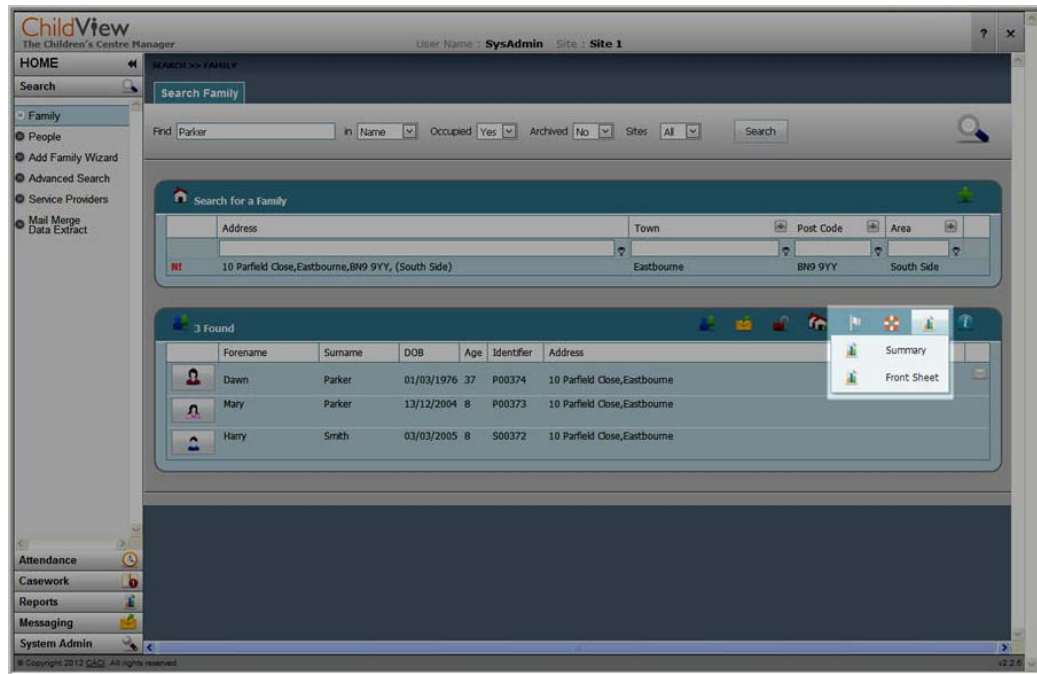
Please refer to section 3.1.1 Maintain professionals involved.

2.1.7. Family reports



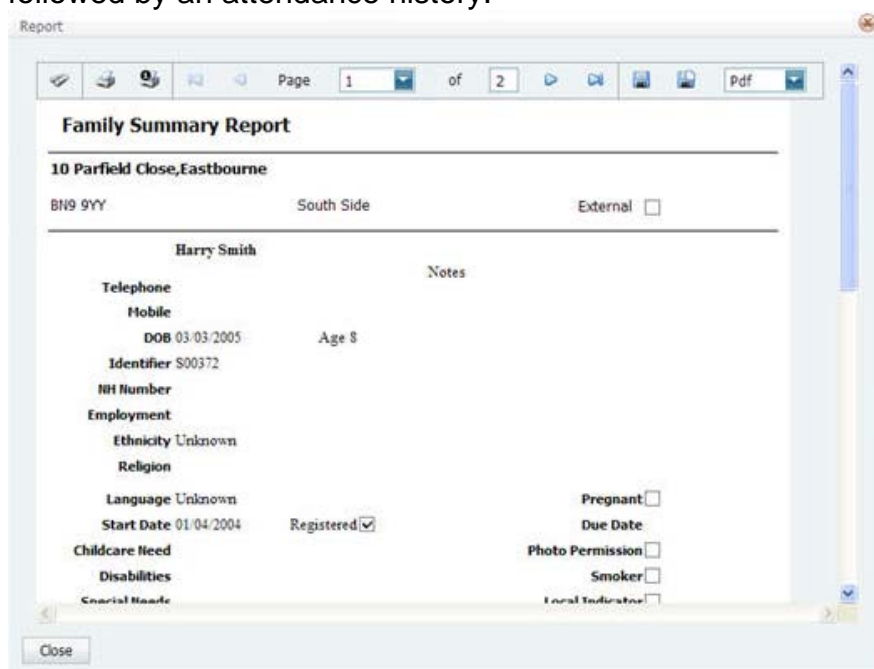
icon. New print

Hovering over this icon will cause a pop up menu to appear that contains two entries:



Summary report

This report prints a detailed snapshot of each individual's settings and notes followed by an attendance history.



Front Sheet

This report is a simple one line per person in the family and is designed as a front page for a family information folder.

Family Record Front Sheet Report

10 Parfield Close, Eastbourne
BN9 9YY South Side External ☐

Identifier	Name	Telephone	DOB	Age	Parent	Pregnant	Registered
S00372	Harry Smith		03/03/2005	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00373	Mary Parker		13/12/2004	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00374	Dawn Parker		01/03/1976	37	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTES:

Close

Outputting reports

There are various output options available which enable you to save or print a report, as illustrated below.

Family Record Front Sheet Report

10 Parfield Close, Eastbourne
BN9 9YY South Side External ☐

Identifier	Name	Telephone	DOB	Age	Parent	Pregnant	Registered
S00372	Harry Smith		03/03/2005	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00373	Mary Parker		13/12/2004	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00374	Dawn Parker		01/03/1976	37	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTES:

Close

2.1.8. Family referrals



icon.

Click on this icon to see a list of referral cases in respect of all individuals registered to the selected address.

Referrals

Referrals for all at: 67 Ash Park, Eastbourne, BN5 6TF, (South...

#	Date	Who	Referred To	Referred By
<input type="checkbox"/>	03/09/2012	Mary Harris	Music Classes	Mary Peters
Notes Referred Mary to the Music Class as she appears to be musically gifted. 04/09/2012 - Mary says she wants to be a drummer.				
	03/09/2012	Reg Harris	Singing Lessons	Gwenda Maughan
Notes Reg has asked if he can have singing lessons. Outcome 05/09/2012 - Gwenda Maughan 05/09/2012 - Reg attended a singing lesson. Decided he didn't like it.				

From the Referrals screen, you can edit referrals or allocate outcomes in respect of them. For more information about referrals, please see section xx adding referrals.

3. Moving a family address

1. Search for family



2. Click the move icon

When you press this icon, you'll be asked to confirm that you proceed with an Address Move.

3. Pressing Ok will present you with a screen similar to the following that allows you to move family members from one address to another.

4. Search for the address that you would like to move the family to.

5. The Family who are moving will be listed under their current address on the left-hand side of the move family address screen. If all the

people are moving together to the same new address, click the '>>' button in the centre of the screen. The names of all the people will move to the 'People to move' box (see the picture below). If some, but not all, of the family are moving, click on each person who is moving and, after each click, click on the '>' button instead. You will be moving each family member to the 'People to move box' individually. In the example shown below, no-one is living at the address the family is moving to (hence the 'Destination family members' box (bottom right) is empty), and the destination address (111 Parfield Close) has already been set-up on the database.

- Once you have moved the appropriate names into the People to move box, click the 'Accept Move' button.

4. People search

Click on the 'search' menu item on the left hand side and then click the 'people' option. This will allow you to search for individuals (records) in the database and will present you with the following screen:

To quickly see a list of names, click in the name field, type part of the name you are looking for, then click the 'search' button. Your list of results will appear in the main part of the screen, similar to this:

The screenshot shows the 'ChildView' application window with the 'Search People' tab selected. The search criteria panel at the top includes fields for Name, Telephone, Identifier, DOB, Address, Mobile, NHS number, Notes, Search type, Search text, Archived, All Sites, Registered, and Indicator. Below the search panel, a table displays a list of people with columns for Forename, Middle Name, Surname, Known As, Address, DOB, Age, Identifier, Start Date, and Area. The table shows 15 results, with the first few being Ann Smith, Chris Smith, Dean Smith, Gaye Smith, and Harry Smith. Each row includes a link to 'Extended/Confidential Note Count' and 'Notes'.

Forename	Middle Name	Surname	Known As	Address	DOB	Age	Identifier	Start Date	Area
Ann		Smith		34 Ramside Field, Eastbourne, BC3 6DF, (East Side)	29/07/2000	12	SM00190	01/02/2001	East
Chris		Smith		11 Duck Park, Eastbourne, BB2 5RF, (West Side)	13/02/1970	43	SM00057	12/12/2000	West
Dean		Smith		11 Duck Park, Eastbourne, BB2 5RF, (West Side)	08/03/1995	18	SM00059	12/12/2000	West
Gaye		Smith		34 Ramside Field, Eastbourne, BC3 6DF, (East Side)	08/11/1966	46	SM00186	01/02/2001	East
Harry		Smith		10 Parfield Close, Eastbourne, BN9 9YV, (South Side)	03/03/2005	8	S00372	01/04/2004	South

1.1. Searching options

The panel at the top of this screen allows you to specify the search criteria for finding people in the database:

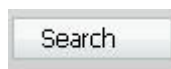
This screenshot shows the same 'ChildView' application window, but the search results area is empty, displaying 'No Current Individuals'. The search criteria panel at the top is identical to the previous screenshot, showing the various fields available for searching people in the database.

Reset criteria icon



Click on this icon to remove all the filters that are currently set in the search boxes, and reset any drop downs to their default entries.

Search button



Click this each time you change one of the filtering option. Alternatively press the Enter key on your keyboard.

1.1. Returned individuals

The search results are limited to 100 records when displayed on the screen and if this happens you may need to be more specific with your search criteria.

It is possible to tell the total amount of records available by looking at the text shown at the top of the individual result grid. The following image illustrates that we can only view 100 records out of a total of 307 records available:

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Site 1

HOME

Search

Search People

Name % Telephone Identifier DOB equal to

Address Mobile NHS number

Notes All Search type Search text

Archived No All Sites Yes Registered All Indicator All

Barcode

Search

People : 100 (100 max) of 310

Forename	Middle Name	Surname	Known As	Address	DOB	Age	Identifier	Start Date	Area
?	?	?		Unknown, Unknow, (Unknown)			000498	13/12/2007	Unkr
Extended/Confidential Note Count : 0 - Notes :									
Adam		Bryant		9 Duck Park, Eastbourne, B82 5RF, (West Side)	08/02/1989	24	BRY0063	12/12/2000	West
Extended/Confidential Note Count : 0 - Notes :									
Adam		Weller		35 Wilton Avenue, Eastbourne, BN14 6UH, (West Side)	07/04/1967	46	WEL0043	01/03/2002	West
Extended/Confidential Note Count : 0 - Notes :									
Alan		George		29 Barnside Field, Eastbourne, BC3 6DF, (East Side)	22/10/1996	16	GEO0004	01/07/2000	East
Extended/Confidential Note Count : 0 - Notes : Not interested in services									
Alan		Gordon		4 Pheasant Court, Eastbourne, BN8 9UU, (East Side)	24/05/2003	10	GOR0119	25/06/2003	East
Extended/Confidential Note Count : 0 - Notes :									

Attendance

Casework

Reports

Messaging

System Admin

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v2.2.6

1.1.4 Individual icons

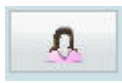
Each individual in the search results will be represented by an icon that will vary according to their status:



= a female adult.



= a male adult.



= a female child.



= a male child.



= unknown gender.

1.1.4 Viewing an individual's full details

Clicking one of the people icons will launch their Individual Full Details screen.

See section 4 individual full details for further information.

1.1.4. Status Indicators

If an individual is the subject of a Referral or an Open Case an R or C indicator will be displayed below the individual icon. Clicking on the C status code will open the associated Case record.

Important Note – The Open Case indicator will only be displayed if the case is assigned to the current site.

1.1. Individual based operations

Once a search has been undertaken you will be presented with a grid of individuals who meet your search criteria. At the top of this result grid are a number of icons that allow you to undertake a range of different operations and the exact icons shown will depend upon your user rights and the number of individuals selected.


Note: The individual selections made are only relevant to the page of results that are currently being viewed. Any selection made on other pages will have been lost when you navigated away from that screen.

1.1.4 Field chooser



Clicking the 'Field Chooser' icon opens a box showing the additional fields that can be viewed in the search results:

Tick the fields you want to include and un-tick the fields you don't want. Once

you have made your selection click the  icon located at the top right of the box to return to the people search screen.

The search grid will update accordingly.

Note: Any changes made to the layout of the search results will be lost when you navigate away from the People Search page.

1.1.4. Exporting results



icon.

Once you have undertaken a search it is possible to export the search results to a .csv file by clicking on this icon shown above. The contents of the .csv file will match the columns shown on screen.

1.1.4. Delete individual



icon.

If you require an individual to be deleted from the database you should contact CCM Support.

1.1.4. Merge duplicates



icon.

If you click this icon, you will see a tool for merging duplicate records.

Please note: only CCM superusers and CCM Support have permission to merge duplicate records. If you require a duplicate record to be merged, contact your local superuser.

1. Add Family Wizard

The Add Family Wizard gives the user the ability to quickly add new individuals into addresses that already exist in the system.

If address does not exist on the system, you need to contact CCM Support so this can be added for you.

Please note: all Barnet addresses are already in the system.

5.1. Address selection page

The screenshot shows the 'Add Family Wizard' Step 1: Address input section. The form includes the following fields:

- House Number
- House Name
- Street Name
- Address Line 2
- Town Name
- County Name
- Postcode
- Area Name


A 'List of Possible Matching Addresses' section is located below the input fields. At the bottom of the form, there are sections for 'Working Address' and 'Current Occupants', and a status message 'Pending New or Duplicate Address'.

Annotations on the right side of the screenshot:

- Address input section
- Matching address section
- Working address section

Enter the details of the family address or part details of an existing address into the relevant text boxes.

The street, town and area text boxes respond to the data being typed by providing a drop down list containing 'best matches' for the data currently entered. The matches are existing entries in the database. The user is able to select an entry from the list or continue to type and create a completely new entry. The drop down list of 'best matches' will display a maximum of 25 items.

Should you wish to delete a line entry from the address criteria then you can press the relevant delete icon.  To clear all the inputted data, click on the 'Clear Inputs' button.

5.2 Matching address section

As data is entered or selected in the input section, a list of 'matching' addresses will appear in the possible matching addresses list. The addresses listed are existing addresses in the system. The user is able to select and work with one of the addresses listed.

The possible matching addresses list will only display a maximum of 25 existing addresses. The user may need to further refine the data in the input section if the existing address they require does not appear in the list.



If the address that you are trying to input does not appear on the system, you will need to send the full address details to ccm.support@barnet.gov.uk to be inputted.

5.3. Working address section

The working address section displays summary details of the address with which to proceed.

When an address has been selected in the possible matching addresses list, the user will be working with an existing address and the details of the existing address will be displayed in the working address pane.

The current occupants at the selected existing address will appear in the current occupant's panel.

You should only add new families to an address where there are no current occupants.



If the current occupants at the address you require are different from the new registrants, you will need to archive the current family and contact CCM Support to create a duplicate record of the address. Refer to Section 5: Archiving.

When an existing address is selected, the correspondee for the address will be identified with a I and contact details will be displayed as illustrated below:

The 'Go to Family View' button will become active when an existing address is selected. It provides the option to link directly to the Family Search window with the address pre-selected.

Once you have selected the required address with no current occupants, click next button to proceed.

5.4. Add family members

Working address section

The working address section displays the address at which new family members will be added. If the new address is an existing address in the system, the current occupants (if any) will be displayed in the 'Currently Existing Occupants' pane.

It is possible to create new members based on the details of an already existing family member. Select the existing family member the details of which best match the pending new member. Click on the 'Selection As Template' button. The 'Common' details will be imported into the member input section. Not all details will be imported, only shareable detail that has been set for the template occupant will be imported.

It is not possible to edit details for an existing family member using the wizard.

Member Input Section

Enter the details and select the appropriate options for a new family member using the relevant text boxes and drop down lists.

It is possible to retain much of the input detail for a new member and have it applied to successive new family members. Member details that support this functionality will have a 'Hold' check box. If the 'Hold' check box is ticked, the contained data will not be cleared when the new member is added to the pending new occupants list.

Registered Check box

This check box is shown in various locations, including some reports. The purpose of this check box is to confirm that you have had a consent form from the individual concerned in relation to the data stored about them.

It is essential for Data Protection purposes that you have received consent from all parties concerned before you are permitted to keep any personal information about them.

Child field

Assuming you have entered the Date of Birth on the record, the system will know if the person is a child or adult. Entering the date of birth permits the automatic selection of the Child field.

Note: The system will automatically tick the 'Child' indicator for Children who are aged up-to-and-including 12 years. To record an individual aged 13 or over as a child, the 'Child' Field would have to be manually selected. This will not affect the reports, as they all use the date of birth to check the age of children.

If you have not entered the individual's date of birth, the system assumes the person is an adult, but not a parent. You will need to use the 'Adult' menu option in the Individual Full Details screen to modify these details.

It is, however, very important that all children have their date of birth entered on to the database. Without a date of birth the system has no way of knowing how old a child is and will ignore them for most of the reports. Provided the correct date of birth is entered, the system will maintain the record for you in terms of keeping their age up to date.

Correspondee field

This indicator is very important. It is used by the 'Correspondee mailing list for the selection' function (in the Attendance Review screen & Mail merge / Data Extract screen Output options, where you can generate a mailing list) to identify which person in each household you want to write to.

Decide who you would normally want to write to in each family.

If you do not want a family included in a mailing list, then simply ensure that nobody in the family has the 'Main Correspondee for the family?' indicator ticked.

If you want to write to more than one person at an address, you can tick more than one indicator. They will each be included in the mail list, and will therefore have their own, individually-addressed correspondence/labels.

Duplication checking

Once details have been entered in the Forename and / or Surname fields the duplication checker will check to see if there are any similar individuals in the database. The matching process occurs on similar 'sounding' names so the list of results won't always show exact matches.

Any possible matches will be shown in the matching individuals list box, and a count of the possible matches will show to the right hand side of the Forename / Surname fields:

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME

Search

Family

People

Add Family Wizard

Advanced Search

Service Providers

Mail Merge

Data Extract

Indicates mandatory fields *

Title

Forename

Middle Name

Surname: Wilson

Known As

Gender: Unknown

DOB

Matching Individuals in the CCM: 10

Attributes: Registered ☒ Correspondent ☐ Parent ☐ Child ☐

List of Possible Matching Individuals

Matching Individuals [10]

Mr Alan Wilson - (Anyroad,) Gender: Male - DOB: 12/08/68

Alan Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 12/08/68

Ben Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 01/03/05

Bobby Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 12/06/02

David Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 08/05/02

Only displaying the first 25 possible matches. You may need to refine your input details.

Phone

E-Mail

Mobile

NH Number

Doctor

Hold

Hold

Hold

Hold

Hold

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Once all the required data has been entered for the new family member press the 'Add Family Member' button to add to the pending new occupants list. Should any duplicates have been found you will need to tick the 'Please Confirm Individuals Reviewed to Proceed' checkbox to enable the 'Add Family Member' button.

You can quickly clear all input and reset the member input section to default by clicking the 'Clear All Input' button. Be aware that using this button will also reset all the 'hold' check boxes to the un-ticked state.

Personal details section

The Personal detail section allows you to enter additional data for the individual that you are adding to the database.

This section has been customised to match the registration form.

There are two different sections, one for adults and one for children.

Pending Members Section

The pending new occupants section displays all the newly created family members that are due to be added to the working address.

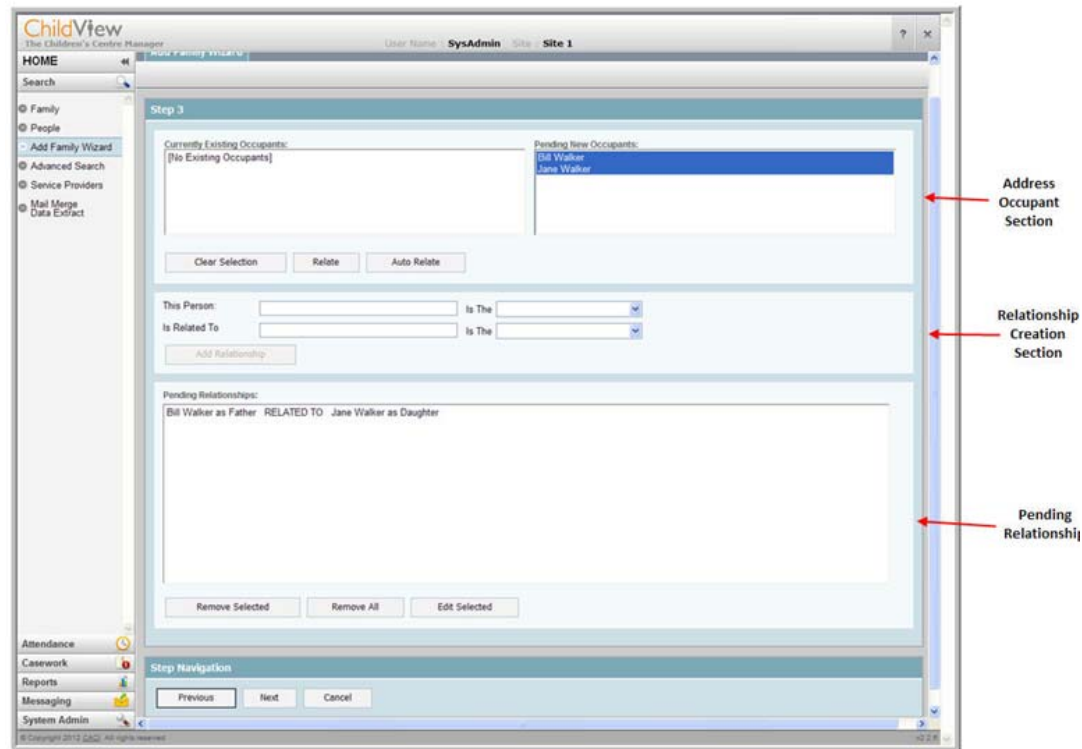
You can edit the details of a pending new member by selecting the member from the list and clicking the 'Edit Selected' button. The details of the selected member will be imported back into the member input section for editing. When editing a pending member, the buttons in the member input section will change to the 'Accept/Cancel' arrangement. Make the necessary changes to the member and click 'Accept Edit'.

You can remove a pending new member by selecting the member and clicking the 'Remove Selected' button.

You can remove all the pending new members by clicking the 'Remove All' button.

5.5. Adding relationships

The relationship page allows you to record the relationships between individual family members. The address occupants section displays the occupants at the previously specified address.



Address Occupants Section

The address occupants section displays the occupants at the previously specified address. Existing occupants in the left pane and pending new occupants in the right pane.

You can select pair combinations of occupants from either pane and then create a relationship between them.

Note: It is not possible to create relationships between two existing occupants.

Relationship Creation Section

With two occupants selected, you can define the relationship between them in this section.

Clicking the 'Relate' button will make the two occupants appear in the textboxes. A list of relation types will be populated in the dropdown next to the first occupant. Once the relation type for the first occupant has been selected, the corresponding relation types will be available for selection for the second occupant.

It is also possible to create a standard relationship set between all selected occupants using the 'Auto Relate' feature.

Note: You must select the relation types for both occupants before the relationship can be added to the pending list.

Auto relate

This button allows you to create a standard relationship set between all selected occupants using the 'Auto Relate' feature.

This will allow the user to quickly produce a set of relationships for a single new member of an existing family or even all members of a completely new family.

The standard relationships are defined as:

'First' Generation Relationships	Husband – Wife
	Father – Son
	Father – daughter
	Mother – Son
	Mother – Daughter
'Second' Generation relationships	Brother – Brother
	Brother – Sister
	Sister – Sister

The Auto-Relate feature uses the 'parent' and 'gender' settings for the selected members to select the appropriate relationship. This means that selected members without a gender set (or set to 'Unknown') will not be auto-related. Selected members with parent status will naturally be one side of a first generation relationship. Those without parent status will always be one side of a second generation relationship.

You can create auto-relationships between two or more selected occupants. Auto-relationships can be created between each selected existing member to each and every pending selected member. Auto-relationships can be created between all possible pair combinations of the selected pending members. Auto-relationships cannot be created between the selected existing members.

To create relationships automatically, select the occupants to relate and click the 'Auto Relate' button.

Step 3

Currently Existing Occupants:	Pending New Occupants:
[No Existing Occupants]	David Soames Sheila Soames Matilda Soames Davie Soames

This Person: Is The

Is Related To Is The

Pending Relationships:

David Soames as Husband	RELATED TO	Sheila Soames as Wife
David Soames as Father	RELATED TO	Matilda Soames as Daughter
David Soames as Father	RELATED TO	Davie Soames as Son
Sheila Soames as Mother	RELATED TO	Matilda Soames as Daughter
Sheila Soames as Mother	RELATED TO	Davie Soames as Son
Davie Soames as Brother	RELATED TO	Matilda Soames as Sister

Note: Hold the 'Ctrl' key to make multiple selections.

Relationships for all possible combinations will be added to the pending relationships list.

You can edit any auto-generated relationship in the same way as a manually created one. Select the relationship to edit and click 'Edit Selected' button.

Note: Only one relationship between the same two members will be permitted.

Pending Relationships Section

The pending relationships section displays all the newly created relationships that are due to be added to the pending occupants.

You can edit the details of a pending new relationship by selecting the relationship from the list and clicking the 'Edit Selected' button. The details of the selected relationship will be imported back into the relationship creation section for editing. Make the necessary changes to the member and click 'Accept Edit'.

You can remove a pending new relationship by selecting the member and clicking the 'Remove Selected' button.

You can remove all the pending new relationships by clicking the 'Remove All' button.

Relate – Manually setting relationships

Clicking this button will cause the names of the two occupants to appear in the text boxes.

The screenshot shows a web interface titled 'Step 3'. It has two main panels: 'Currently Existing Occupants:' and 'Pending New Occupants:'. The 'Currently Existing Occupants:' panel lists three people: John Benny, DOB: 23 Sep 1968, Age: 44; Michelle Benny, DOB: 01 May 1985, Age: 28; and Jack Benny, DOB: 04 Feb 2000, Age: 13. The 'Pending New Occupants:' panel lists Sharon Benny. Below these panels are three buttons: 'Clear Selection', 'Relate', and 'Auto Relate'. At the bottom, there are two text boxes: 'This Person:' containing 'Jack Benny, DOB: 04 Feb 2000, Age: 13' and 'Is Related To' containing 'Sharon Benny'. To the right of each text box is a dropdown menu labeled 'Is The'. Below these text boxes is an 'Add Relationship' button.

Select the relation type for the first occupant from the list of available relations.

When the selection has been made, the relation type options for the second occupant will be populated.

Select the relation type for the second occupant.

This screenshot is similar to the previous one, but the dropdown menus are now populated. The 'Is The' dropdown for 'This Person:' shows 'Brother' selected. The 'Is The' dropdown for 'Is Related To' shows 'Sister' selected. The 'Add Relationship' button is still present at the bottom.

Accept the new relationship by clicking the 'Add Relationship' button. The new relationship will be added to the pending relationships list.

Using the same process, continue to create and add new relationships for each occupant pairing as required.

Note: Only one relationship between the same two members will be permitted.

Once all the relationships have been created, click the 'Next' button to move to the Pending Additions Summary page where you can review the details added previously.

5.6. Creating professional relationships

The Add Family Wizard includes the functionality to enable one or more professional relationships to be created for an individual. The illustration below shows a Health Visitor (Sally Evans) being assigned to David George.

ChildView
The Children's Centre Manager

User Name : User Site : Management Console

HOME Search

Family
People
Add Family Wizard
Advanced Search
Service Providers
Mail Merge
Data Extract

Attendance
Casework
Reports
Messaging
System Admin
Site Admin

SEARCH >>> ADD FAMILY WIZARD

Add Family Wizard

Add Professional Relationships

Currently Existing Occupants:

- Ms Amanda Parrish, DOB: 07 Aug 1967, Age: 46
- Mr Andy George, DOB: 17 Sep 1995, Age: 18
- Mr Alan George, DOB: 22 Oct 1996, Age: 17
- Mr Colin George, DOB: 29 Dec 2003, Age: 9

Pending New Occupants:

- David George

Service Provider (300 Maximum)

Central Surgery			
Children Centre			
Connexions			
Health Centre			
Health Visitors			

Professional (300 Maximum)

Sally Evans	12 Collingwood Place BN10 9FF	01155-678901	sallyevans@internet.com
Sophie Heworth			
Steve Jenkins	12 The Street, Eastbourne	01323-987654	
Suki Ahsam			
Vicky Rowe			

Professional relationships can be added and removed in the same way as in Family Relationships.

ChildView
The Children's Centre Manager

User Name : User Site : Management Console

HOME Search

Family
People
Add Family Wizard
Advanced Search
Service Providers
Mail Merge
Data Extract

Attendance
Casework
Reports
Messaging
System Admin
Site Admin

SEARCH >>> ADD FAMILY WIZARD

Add Family Wizard

Add Professional Relationships

Currently Existing Occupants:

- Ms Amanda Parrish, DOB: 07 Aug 1967, Age: 46
- Mr Andy George, DOB: 17 Sep 1995, Age: 18
- Mr Alan George, DOB: 22 Oct 1996, Age: 17
- Mr Colin George, DOB: 29 Dec 2003, Age: 9

Pending New Occupants:

- David George

Service Provider (300 Maximum)

Central Surgery			
Children Centre			
Connexions			
Health Centre			
Health Visitors			

Professional (300 Maximum)

Sally Evans	12 Collingwood Place BN10 9FF	01155-678901	sallyevans@internet.com
Sophie Heworth			
Steve Jenkins	12 The Street, Eastbourne	01323-987654	
Suki Ahsam			
Vicky Rowe			

This Person: David George Has a professional relationship with: Sally Evans Service: Health Visitors

Relation Type: Carer

Start Date: 19 Dec 2013

Add Relationship ☐ Apply to Family

Pending Professional Relationships:

Remove Selected Remove All

Step Navigation

Previous Next Cancel Create Address Only

5.7. Pending additions summary and confirmation

A summary of information you have entered for your review. You can also go back to alter data if required.

SEARCH >> ADD FAMILY WIZARD

Add Family Wizard

Step 4

Address Detail Summary
Working with the existing address: 1 Crow Court, Eastbourne, BN9 5UT, (Coles Estate)

Member Detail Summary
2 new family members will be added summarised as...
Mr Bill Walker
Jane Walker

Relationship Detail Summary
All defined relationships will be created.

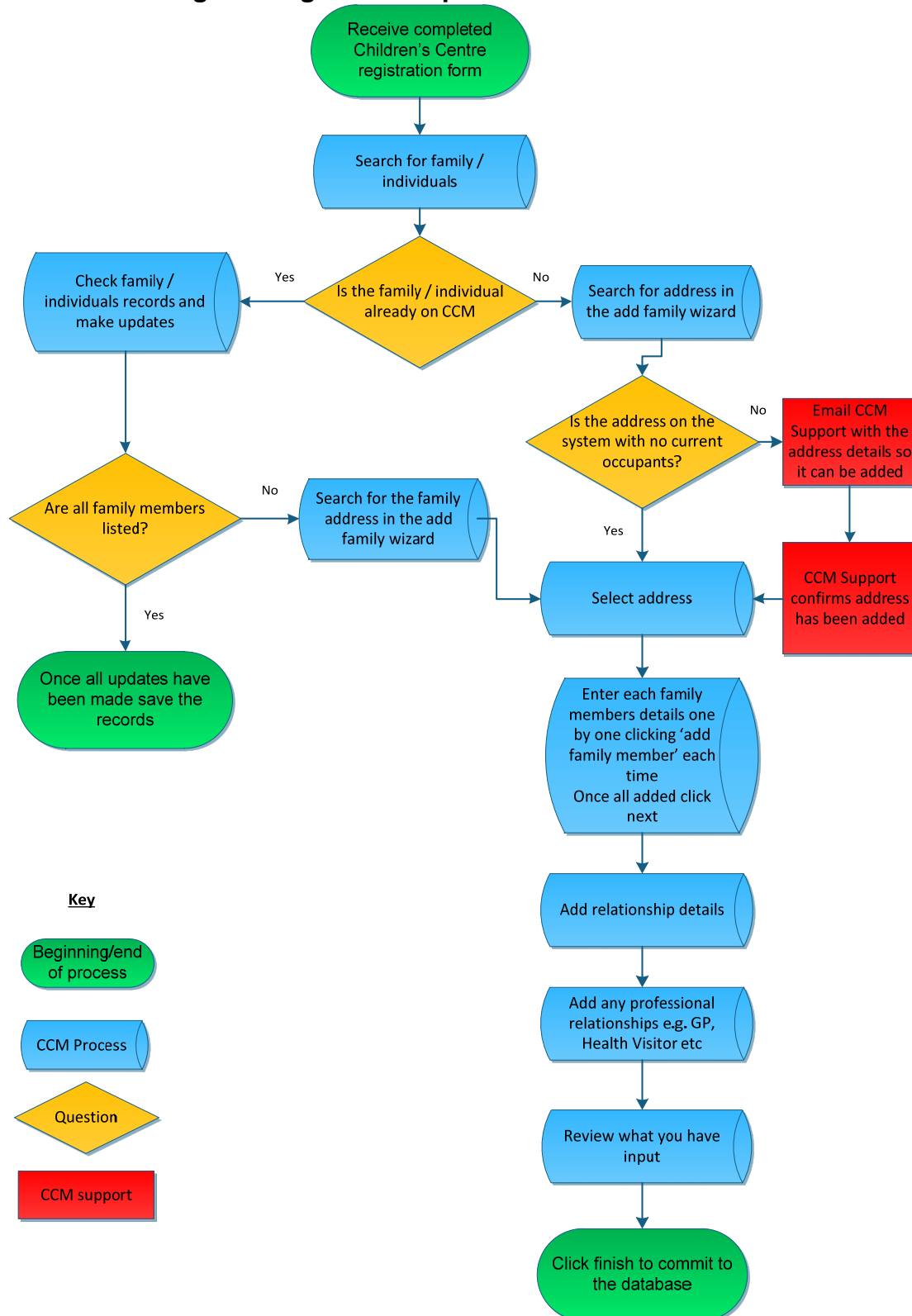
Step Navigation

Previous Next Cancel

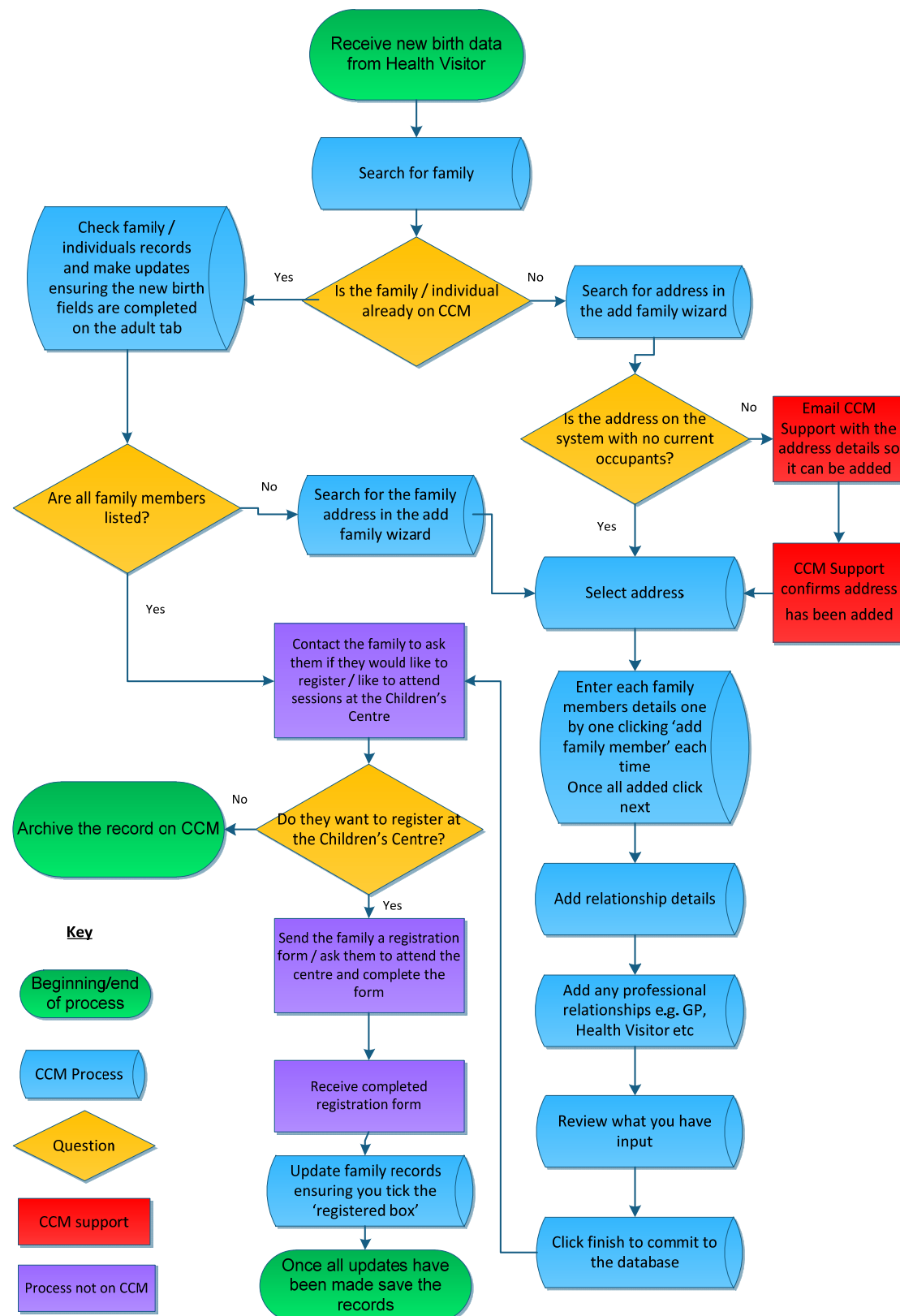
Click next.

On the following screen click Finish to commit information to database. The wizard will then go to the Family Search screen with the new address and occupants displayed.

5.8. Adding new registrations process



5.9. Adding new birth data process



Section 3: Attendance menu

1. Attendance overview

The attendance menu item located on the left hand side of the screen on CCM.

The attendance menu contains the starting point for adding records of attendance at the various activities your programme provides (the input option).

It also provides you with a very flexible and powerful tool for reviewing and analysing the overall attendance at those activities, through the review option.

Please note: the attendance review is not covered in the basic user training guide.

1.1. Attendance summary

It is possible to gain summary information about activities / sessions.

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

MAIN MENU

- Search
- Attendance
 - Input
 - Review
 - Barcode Registers
- Casework
- Reports
- System Admin

ATTENDANCE >> INPUT

Attendance Input

Please select an Activity

Adult Learning | MAR | 2013

View Sessions | New Activity

Select Session

Please select an Activity.

Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Adult Learning MONTHLY		0			

Manage Bookings | Manage Attendances | Copy Session | New Session | Edit Session | Delete Session

Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.

You can now view information about the number of Attendees (not the number of attendances), the number of Bookings (i.e. the number of people who have expressed an interest to attend this session), Maximum Capacity of the session and also the number of Spaces Remaining for the selected activity type.

A negative number in the 'Spaces Remaining' column shows that the session is over subscribed.

1.2. Activities

Activities are the pre-set over-arching theme for all sessions. They also have the Tiers and Every Child Matter Outcome pre-allocated to them.

For example, a centre can create a Coffee Morning session can fall into a 'stay and play' activity.

Centres can name their sessions as they wish, but must categorise them using the activity groups listed in the session relationship table. This allows for effective performance reporting.

Table 1: Activity relationship table

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Adult Learning	Any course/workshop/training designed focussed on adult learning	<ul style="list-style-type: none"> • Manicure & Pedicure • Complimentary Health • First Aid • Health & Safety • IT courses • Parenting Courses • Adult Numeracy/Literacy • Parent Volunteering • ESOL 	<ul style="list-style-type: none"> • Tier 1 • ESOL • Adult learning • (ESOL is a targeted course, and would need to be recorded as a Tier 2) 	<ul style="list-style-type: none"> • Healthy living
Baby Groups	Any activities focussed on babies under 1 year old	<ul style="list-style-type: none"> • Breastfeeding sessions • Baby Massage • Baby Yoga • Baby weaning • Baby Play/Group • Baby Makaton • Baby Rhyme Time 	<ul style="list-style-type: none"> • Tier 1 • Baby weighing • Breastfeeding support • Immunisations • Transitions to solids 	<ul style="list-style-type: none"> • Child development • Healthy living • Physical development
Child Health Services	Events aimed at the health and wellbeing of children 0-5 years	<ul style="list-style-type: none"> • Health visitor appointments • Baby clinic • Immunisations • Development checks • Healthy start vitamins 	<ul style="list-style-type: none"> • Tier 1 • Transitions to solids • Healthy eating • Baby weighing • Immunisations • Oral health • Breastfeeding support 	<ul style="list-style-type: none"> • Child development • Healthy living

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Childminder Groups	Sessions aimed at registered childminders	<ul style="list-style-type: none"> Childminder Drop-in 	<ul style="list-style-type: none"> Tier 1 	<ul style="list-style-type: none"> Creativity Holistic play
Community Support Outreach	<p>Activities in the community aimed at promoting the Children's Centre that are run at other community venues</p> <p>This does not include all sessions run at linked venues i.e. stay and play etc</p>	<ul style="list-style-type: none"> Schools fetes Community festivals/events School open evenings Information stalls 	<ul style="list-style-type: none"> Tier 1 	<ul style="list-style-type: none"> Knowing your community
Crèche	Occasional childcare for children during particular events such as parenting programmes.	<ul style="list-style-type: none"> Crèche 	<ul style="list-style-type: none"> Tier 1 	
Domestic Violence	Specialist service designed to support vulnerable families.	<ul style="list-style-type: none"> DV Safer Families DV Stay & Play DV Parenting DV Counselling 	<ul style="list-style-type: none"> Tier 3 	<ul style="list-style-type: none"> Parenting support Building confidence
Economic Wellbeing	Activities and advice from specialist and/or CC that assist families in achieving economic wellbeing.	<ul style="list-style-type: none"> Citizen's Advice Welfare Rights Advice & Information Employability courses Housing Support Advice & Information REED 	<ul style="list-style-type: none"> Tier 1 Access to benefits / training / employment / legal advice / volunteering opportunities / housing support 	<ul style="list-style-type: none"> Building confidence

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Early Learning & School Readiness	Any activity that supports a family in transitioning a child into pre-school/nursery or school.	<ul style="list-style-type: none"> • Transition Support • Preparing for school • Meet the teacher • Preparing parents to support children to go to school • Workshops/sessions on FEE or FEE2 • Speech and Language stay and play (i.e. chatty play/SPLAT) – This does not include S&L drop in • Toy Library • Book club/library 	<ul style="list-style-type: none"> • Tier 1 	<ul style="list-style-type: none"> • Child development • Language development
Extended Services	Activities held for children outside of school hours.	<ul style="list-style-type: none"> • Breakfast Clubs • After school clubs • Holiday schemes 	<ul style="list-style-type: none"> • Tier 1 	<ul style="list-style-type: none"> • Social development • Physical development • Creativity • Holistic play
Family Support Outreach	Aimed at families referred/self-referred, potentially at risk requiring additional family support.	<ul style="list-style-type: none"> • CAFS (reviews/meetings) • Outreach phone calls and correspondence • Outreach in centre • Outreach out of centre 	<ul style="list-style-type: none"> • Tier 2 • Any other relevant target can be added depending on what is covered in the session 	<ul style="list-style-type: none"> • Any appropriate aims

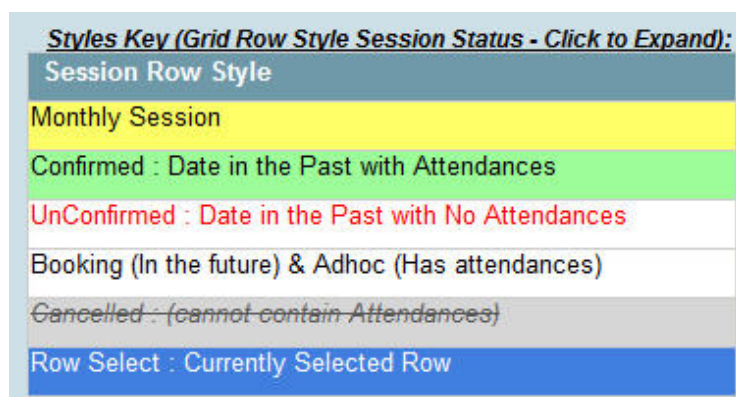
Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Family Support Outreach – Home visits	Aimed at families referred/self-referred, potentially at risk requiring additional family support	<ul style="list-style-type: none"> Home visits 	<ul style="list-style-type: none"> Tier 2 Any other relevant target can be added depending on what is covered in the session 	<ul style="list-style-type: none"> Any appropriate aims
Health & Safety	Events focussed at promoting family health or safety either as an individual or in the home.	<ul style="list-style-type: none"> Healthy cooking Fire safety Home safety 	<ul style="list-style-type: none"> Tier 1 Transitions to solids Healthy eating Oral health Immunisations Smoking cessation Baby weighing 	<ul style="list-style-type: none"> Healthy living Safety in the home
Male Carers Groups	Sessions aimed at male carers.	<ul style="list-style-type: none"> Fathers groups U8's football 	<ul style="list-style-type: none"> Tier 2 	<ul style="list-style-type: none"> Parenting support
Maternity Services	Events aimed at new or expectant parents.	<ul style="list-style-type: none"> Ante Natal Classes Post natal classes Unity 	<ul style="list-style-type: none"> Tier 2 Baby weighing Breastfeeding support (Unity is a specialist service, and would need to be recorded as a Tier 3) 	
One-off Events	One off events run by the Children's Centre.	<ul style="list-style-type: none"> Fundraising events Day trips Educational visits Fun-days 	<ul style="list-style-type: none"> Tier 1 	

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Parenting Programmes	Evidence based parenting programmes these are specialist run courses.	<ul style="list-style-type: none"> Strengthening families Triple P Incredible Years Solihull Family Links 	<ul style="list-style-type: none"> Tier 2 	<ul style="list-style-type: none"> Parenting support
Parenting Support Workshops	Parenting support workshops can include bespoke workshops/short courses of parenting support needs including supporting parents with routines, sleep, potty/toilet training and can be run by CC staff, Health Visitors or partner organisations.	<ul style="list-style-type: none"> Child sleep workshops Toilet training workshops Behaviour advice workshops 	<ul style="list-style-type: none"> Tier 1 Adult learning 	<ul style="list-style-type: none"> Parenting support Child sleep support Toilet training support Behaviour support
Parents Groups	Sessions for parents where their children are not present.	<ul style="list-style-type: none"> Parent support groups Parents forums Coffee mornings Advisory Boards 	<ul style="list-style-type: none"> Tier 2 	<ul style="list-style-type: none"> Parenting support
Significant contact and advice	Time spent giving information and advice to parents. This could be face-to-face or a telephone contact. Full details should be recorded in the notes. This is not to include mail-shots of timetables.	<ul style="list-style-type: none"> Breastfeeding advice Telephone surveys Follow-up phone calls e.g. new birth or requesting additional information against registration data 	<ul style="list-style-type: none"> Tier 1 / Tier 2 Breastfeeding support 	<ul style="list-style-type: none"> Parenting support

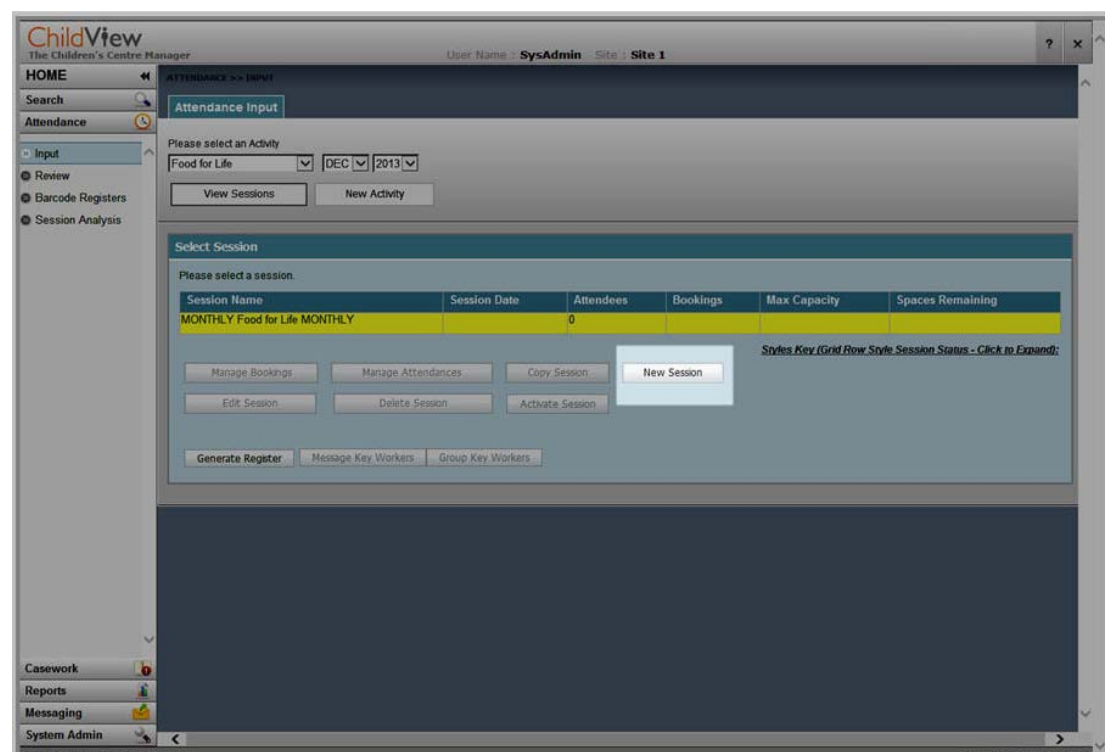
Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Special Needs	Events aimed at families with special education needs (normally run by specialist services)	<ul style="list-style-type: none"> • Open Doors • Mencap • Rainbow Trust • Parents of Down Syndrome Group • Any SEN support group • Speech and Language (1:1) 	<ul style="list-style-type: none"> • Tier 3 	<ul style="list-style-type: none"> • Building confidence • Social development • Emotional development • Language development
Stay and Play	Events for all families focussed on play and development	<ul style="list-style-type: none"> • Stay & Play • Messy Play • Creative Play • Parent & Toddler Group • Music Groups 	<ul style="list-style-type: none"> • Tier 1 	<ul style="list-style-type: none"> • Creativity • Holistic play • Physical development • Social development
Young Parent Groups	Sessions aimed at young and teenage parents (aged 13-24 years)	<ul style="list-style-type: none"> • Arts Depot Activity Run Events • Teenage mother groups 	<ul style="list-style-type: none"> • Tier 2 • (any other relevant target can be added depending on what is covered in the session) 	<ul style="list-style-type: none"> • Parenting support

1.3. Creating a new session

1. To create a session the Activity type must already be set up in the system.
2. From the Side Menu, click the Attendance button, then click the Input option.
3. Select the appropriate entry in the drop down activity list.
4. Press the 'View Session' button. Any existing sessions are listed and colour coded. A key can be displayed by clicking on 'Styles Key (Grid Row Style Session Status - Click to Expand):'



5. Click the 'New Session' button:



You will then be presented with the following screen:

The screenshot displays the CCM system interface. On the left is a sidebar menu with options: MAIN MENU, Search, Attendance, Input, Review, and Barcode Registers. The main area is titled 'Time / Date Options - Click to expand / collapse'. It contains fields for Activity (Adult Learning), Location, Date (20 Mar 2013), Time (From 00:00 To 23:55), Session Name (ESOL), Comment (Level 33), Charge Rate £ (0.00), Charge Type, and Max Capacity (0). Below this is a section titled 'Key Worker / Service Provider / ECM / Recurrence Options'. It has tabs for Services & Key Workers, Every Child Matters, Targets & Aims, and Booking Pattern. The 'Services & Key Workers' tab is active, showing a list of Service Providers (NEW SERVICE PROVIDER, 2 year old scheme, Baby Yoga, Barnet and Southgate college, Barnet Library Services, CAB, Cash Money Management) and a Key Workers section with a 'Default Key Workers' button and a 'Next >>' button.

Please note: it is best practice to use a uniform naming convention for sessions entered onto CCM to allow for simple reporting. Currently there is not the functionality to run reports based on session names; however there is a query that can be used.

1.3.1. Fields and tabs

Time / date options

The activity and location drop downs provide information about the type of session to be held and also where it is located.

When creating sessions, it is best practise to specify a start and end time of the session. Clicking in the box to the right of the word 'time' will allow you to specify the session time in the drop down boxes that become available.

For reference purposes you can specify the amount you will charge for the session (charge rate) and also the charge type from the drop down box. Charge type refers to the charging structure i.e. on a per adult basis, per family basis etc.

Finally ensure the max capacity reflects the maximum number of people who can attend the session.

Key Worker / Services / ECM / Targets/Aims/Resources/Booking Pattern

In this section you can select those Key Workers, Service Providers, Every Child Matters outcomes, local Targets & Aims and Resources that you wish to associate with the session.

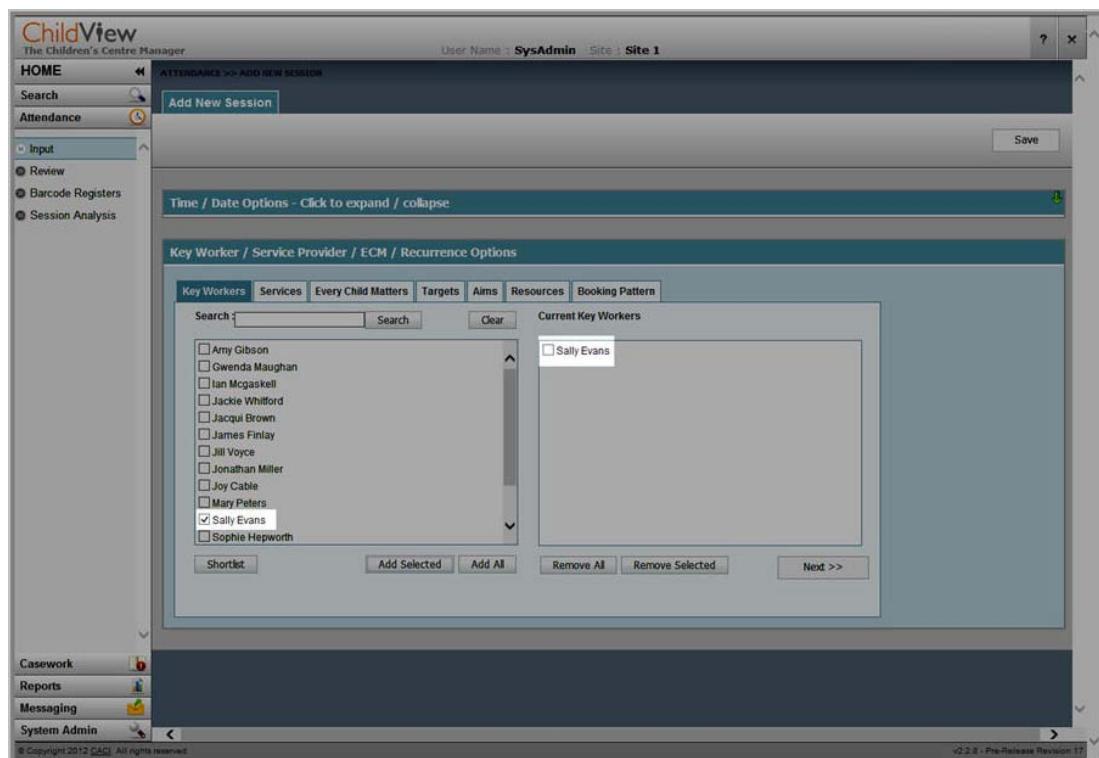
To add items to the session, tick one or more in the left hand pane and click the 'Add Selected' button. The 'Add All' button will add all items irrespective of whether or not they are ticked.

Items added will appear in the right hand pane and can be removed by using the 'Remove Selected' or 'Remove All' buttons.

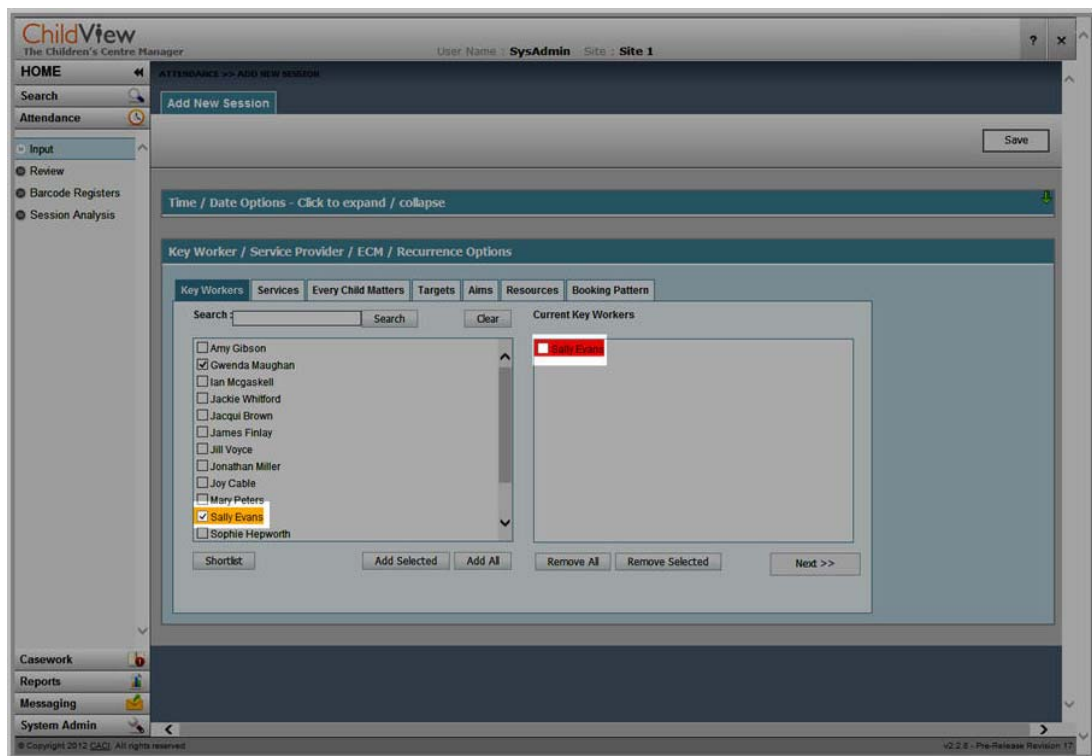
The default targets for the activity will be copied to a new session. You should always review these and update where appropriate.

Please refer to Section 3: Attendance Overview, section 3.4.2 Targets and Aims for further details.

You can either select the applicable tab or press the 'Next' button to move to the relevant screen. The following example shows the Key Workers tab during Add New Session with default settings from the Activity:



Where there is a potential double booking situation (Date and Time) for either a Key Worker or a Resource a warning will be displayed in the form of a colour code as in the following example:



Booking Pattern

The booking pattern tab will allow you to create multiple sessions of the activity type being created i.e. Food for life every week on a Saturday morning.

Once you have entered all of the session details, press the 'Save' button to set up the sessions in the database. You will be presented with the following confirmation screen:



Press 'Add Attendees' to go directly to the manage attendances screen or 'Finish & go To Menu' to return to the list of sessions for the selected activity.

Table 2: fields and tabs quick reference guide

Activity*	Prefilled with activity chosen in previous screen.
Location*	The room/venue session will be held in.
Date*	Course start date
Time*	Tick the time box if the sessions are being held at the same time whenever it reoccurs.
Session Name*	Name of the session being run.
Comment	Any additional comment i.e. what is covered in the session, level of the course etc.
Charge	Any charge per session
Charge Type	Per person, adult, child or family
Max Capacity	Capacity of the room or group
Services*	<p>If sessions that have been run at the centre have been provided by external organisations e.g. Welfare Rights, Unity, REED etc. This must be recorded in the service provider tab.</p> <p>By recording this you are able to run reports to show how many sessions have been run in conjunction with specific service providers.</p> <p>Please note: If a service provider is not listed, email ccm.support@barnet.gov.uk to request for it to be added to the system. Where possible provide the contact details for this service.</p>
Key Workers*	<p>For every session that is run by the centre, the key workers should be recorded. This can include anyone that participated in the running of the session including Children's Centre workers, volunteers and key workers from external agencies such as Health Visitors etc.</p> <p>Please note: If a key worker is not listed, email the name, job title, organisation and contact details to ccm.support@barnet.gov.uk to request for them to be added to the system.</p>
Every Child Matters Outcome	Pre-set but can be amended for a session as required.

Targets *	<p>Targets are the 3 tiers of services, pre-set to activities but can be amended for each session.</p> <p>There are additional targets (please refer to the targets and aims section below); that must be selected for sessions with this focus.</p>
Aims	<p>Aims are similar to targets, and are used to record outcomes of sessions (please refer to the targets and aims section below).</p>
Booking Pattern	<p>If a group is recurring at regular intervals, set up the recurrence in this tab by choosing day, number of occurrences and type of occurrence (daily, weekly, and fortnightly).</p>

*those with a star must be entered for every session inputted.
This information feeds into data used in performance reports.

1.3.2. Targets and Aims

All activity groups have pre-set targets; these are in the form of tiers. When you enter the details of a new session, it will automatically set to the relevant tier.

You must always check the targets and update where necessary.

Every Child Matter (ECM) Outcomes* are also pre-allocated to sessions.

***Please note** that ECM outcomes are no longer used to report on as the Government no longer requires Early Years to use them. This is a standard tab within CCM and this is why it will still appear on the system.

Definitions of tiered services

Tier 1 services

Tier 1 services are universal services that all families can access.

Tier 2 services

Tier 2 services are aimed at targeted families.

Tier 3 services

Tier 3 services are only provided by external agencies / professionals.

Targets that can be assigned to sessions

- Access to benefits
- Access to training
- Access to employment
- Access to legal advice
- Access to volunteering opportunities
- Access to housing support
- Smoking cessation
- Transitions to solids
- Healthy eating
- Baby weighing
- Immunisations
- Oral health
- Breastfeeding support
- ESOL
- Adult learning

Aims that can be assigned to sessions

- Child development
- Physical development
- Emotional development
- Social development
- Language development
- Building confidence
- Creativity
- Holistic play
- Parenting support
- Child sleep support
- Healthy living
- Toilet training support
- Behaviour support
- Safety in the home
- Knowing your community

1.4. Manage attendances

1. From the Side Menu, click the Attendance menu, then click the Input option.
2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME
Search
Attendance
Input
Review
Barcode Registers
Session Analysis

Please select an Activity
Food for Life DEC 2013
View Sessions New Activity

Select Session
Please select a session.

Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Food for Life MONTHLY		0			
Food for Life (Clients Home)	02/12/2013	0	0	0	0
Food for Life (Clients Home)	06/12/2013	0	0	0	0

Manage Bookings Manage Attendances Copy Session New Session
Edit Session Delete Session Cancel Session
Generate Register Message Key Workers Group Key Workers

Styles Key (Grid Row Style Session Status - Click to Expand):

3. Clicking on the Session of interest will enable the buttons at the bottom of the screen. The buttons being enabled will depend upon whether an activity or session was selected:

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME
Search
Attendance
Input
Review
Barcode Registers
Session Analysis

Please select an Activity
Food for Life DEC 2013
View Sessions New Activity

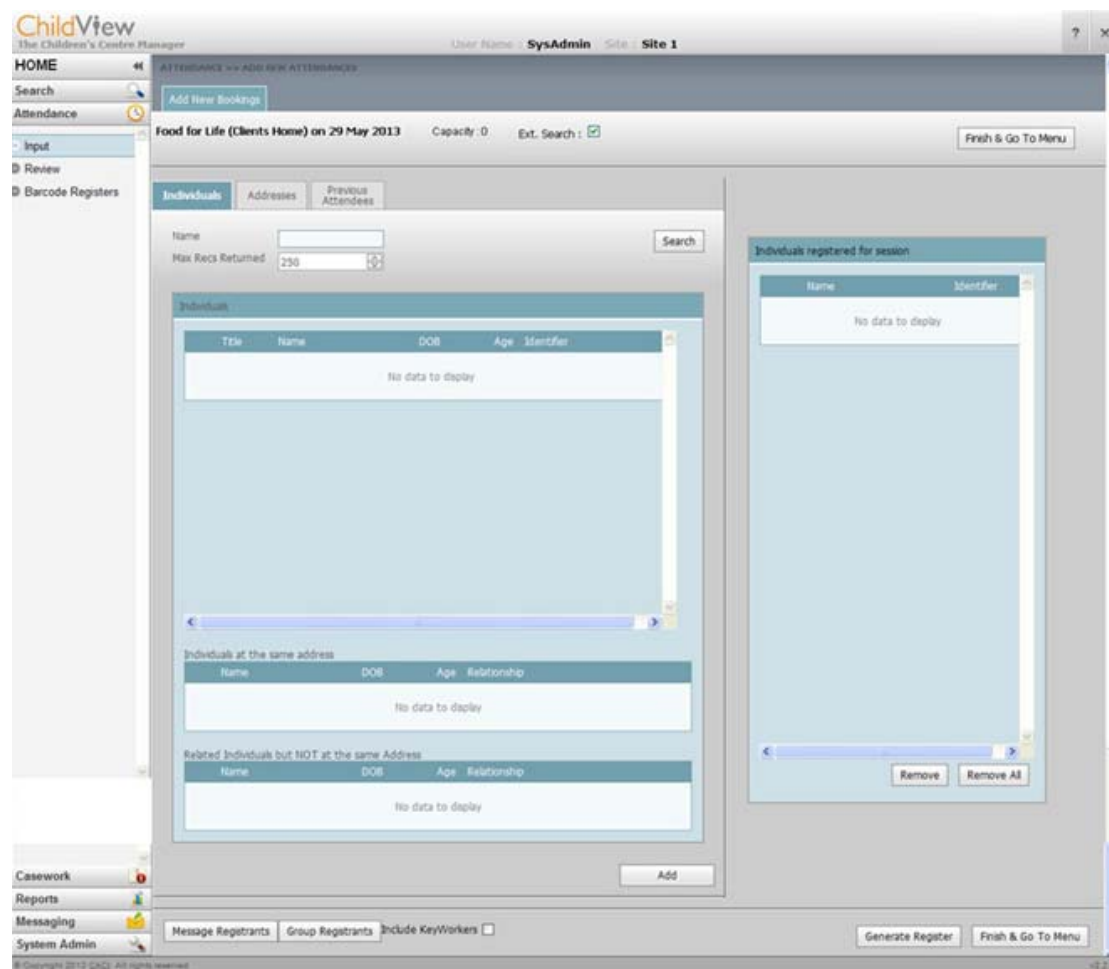
Select Session
Please select a session.

Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Food for Life MONTHLY		0			
Food for Life (Clients Home)	02/12/2013	0	0	0	0
Food for Life (Clients Home)	06/12/2013	0	0	0	0

Manage Bookings Manage Attendances Copy Session New Session
Edit Session Delete Session Cancel Session
Generate Register Message Key Workers Group Key Workers

Styles Key (Grid Row Style Session Status - Click to Expand):

So that you can register those people who are interested in attending a session press the 'Manage Attendances' button. This will open a screen similar to the following:



4. You now have a number of options to search for those people you would like to register for the session. Selecting the applicable tab (Individuals/Addresses/Previous Attendees) will allow you to enter search criteria, and pressing the 'Search' button will return those matching records.

In each case the number of records returned will be limited by the value in the 'Max Records Returned' box (default value 250).

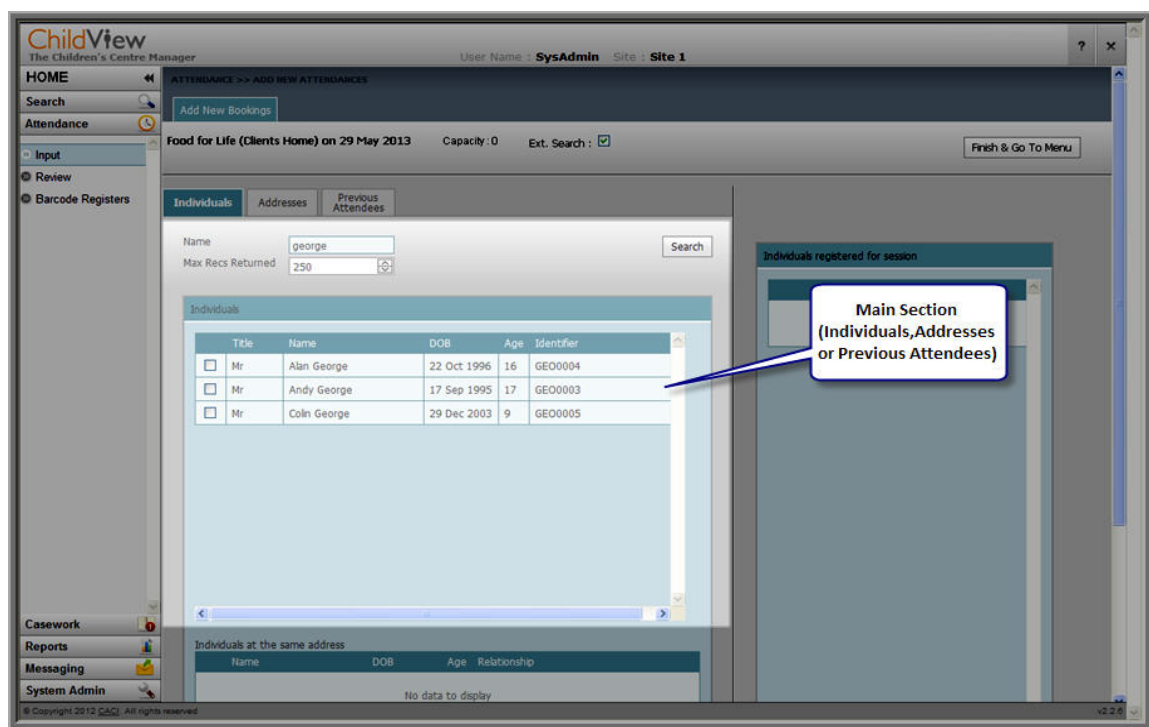
The previous attendees tab will show those people who have attended a similar session in the past 3 months.

Each Search Tab breaks down into 3 sections, as illustrated below. The Main Section in each case will reflect the main search results (Individuals, Addresses or Previous Attendees).

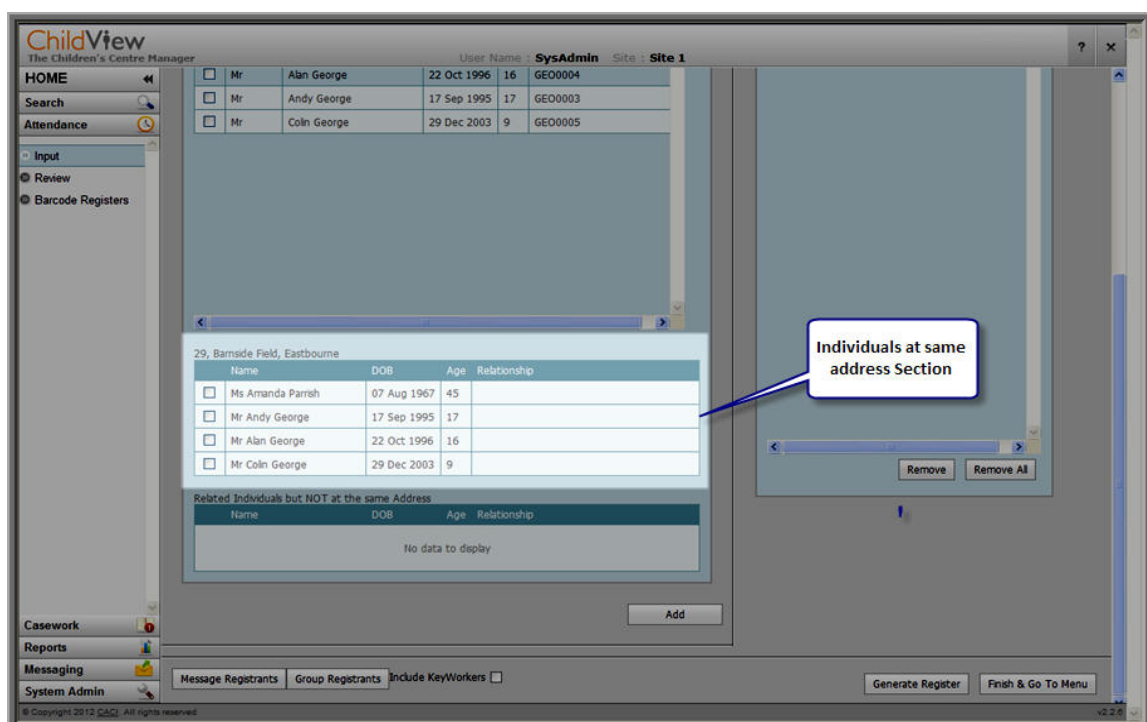
When an individual or address in the top section is clicked, the middle section will display individuals who live at the same address. When an

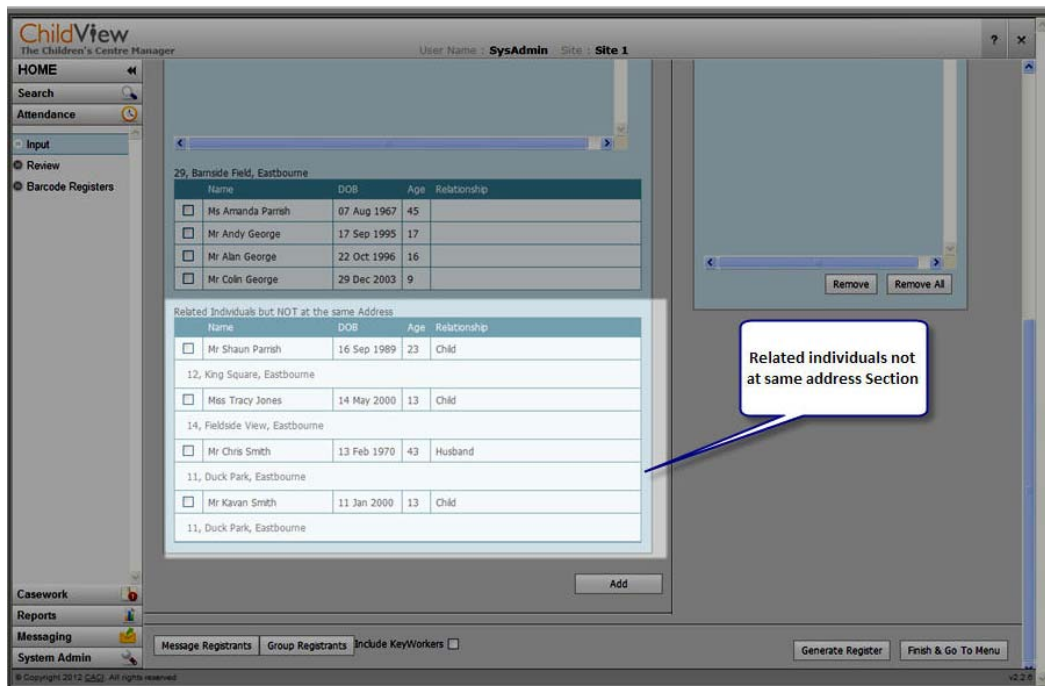
individual is clicked in the middle section, the bottom section will display any other individuals who are related to the selected individual, but don't live at the same address.

Each Search Tab breaks down into 3 sections. The Main Section in each case will reflect the main search results (Individuals, Addresses or Previous Attendees). When an individual or address in the top section is clicked, the middle section will display individuals who live at the same address.

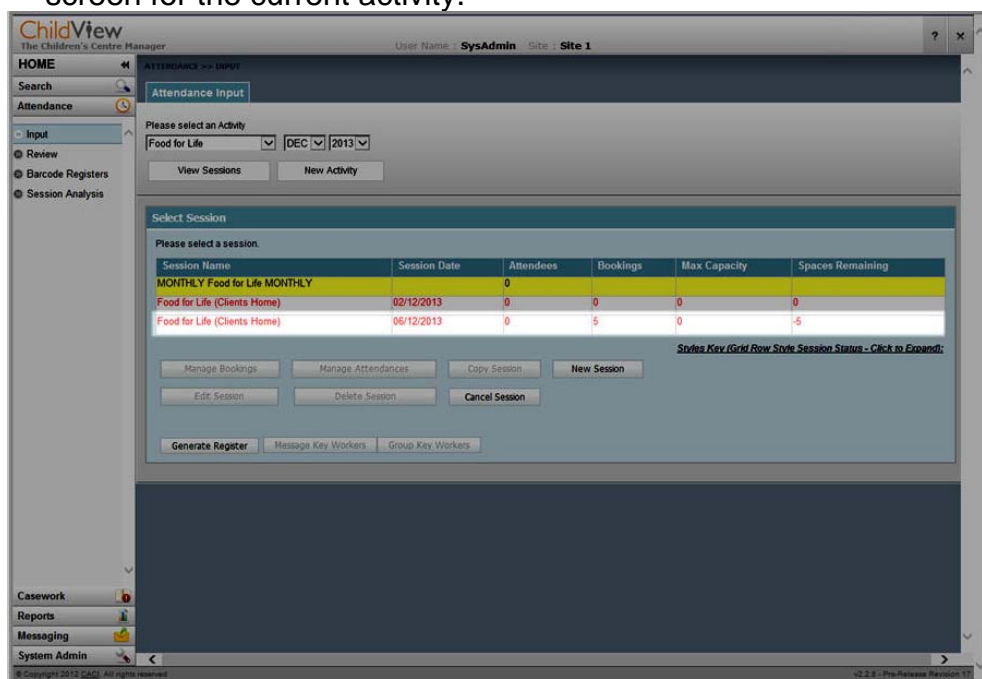


When an individual is clicked in the middle section, the bottom section will display any other individuals who are related to the selected individual, but don't live at the same address.





5. Within all 3 sections, individuals are booked into the session by ticking the selection box and pressing the Add button. If an individual appears in more than one section, the Add button will only add them once. Double clicking an individual will also book them into the session.
6. Should you make an error in your selection, select those names from the right hand side of the screen that should not be in the Results section and press the 'Remove' button. The 'Remove All' button will remove all people in the Results section.
7. Once all your people have been added to the Results section, pressing the 'Finish and go to menu' button will return you to the attendance input screen for the current activity.



8. Viewing individuals who have an attendance recorded on a session

Should you wish to view the names of those people who are actually booked on the session, select the session of interest from the summary page and press the 'Manage Bookings' button.

You will see a list of any individuals booked on the session on the right hand side of the screen.

1.5. Copying sessions

Rather than create a new session and input all the necessary criteria again it is possible to copy an existing session and specify the bits of information you wish to copy.

1. From the Side Menu, click the Attendance menu, then click the Input option. You will see a screen similar to this:

The screenshot displays the 'ChildView' software interface. The title bar indicates 'User Name : SysAdmin Site : Site 1'. The sidebar menu on the left includes 'HOME', 'Search', 'Attendance', 'Input', 'Review', 'Barcode Registers', 'Session Analysis', 'Casework', 'Reports', 'Messaging', and 'System Admin'. The main content area is titled 'ATTENDANCE >> INPUT' and contains two sections: 'Attendance Input' and 'Select Session'. The 'Attendance Input' section includes a 'Please select an Activity' dropdown menu, a date selector set to 'DEC 2013', and buttons for 'View Sessions' and 'New Activity'. The 'Select Session' section includes a 'Please select a session' dropdown menu. The bottom status bar shows '© Copyright 2012 G&G All rights reserved' and 'v2.2.8 - Pre-Release Revision 13'.

2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.

- Clicking on the Session of that you wish to copy will enable the buttons at the bottom of the screen:

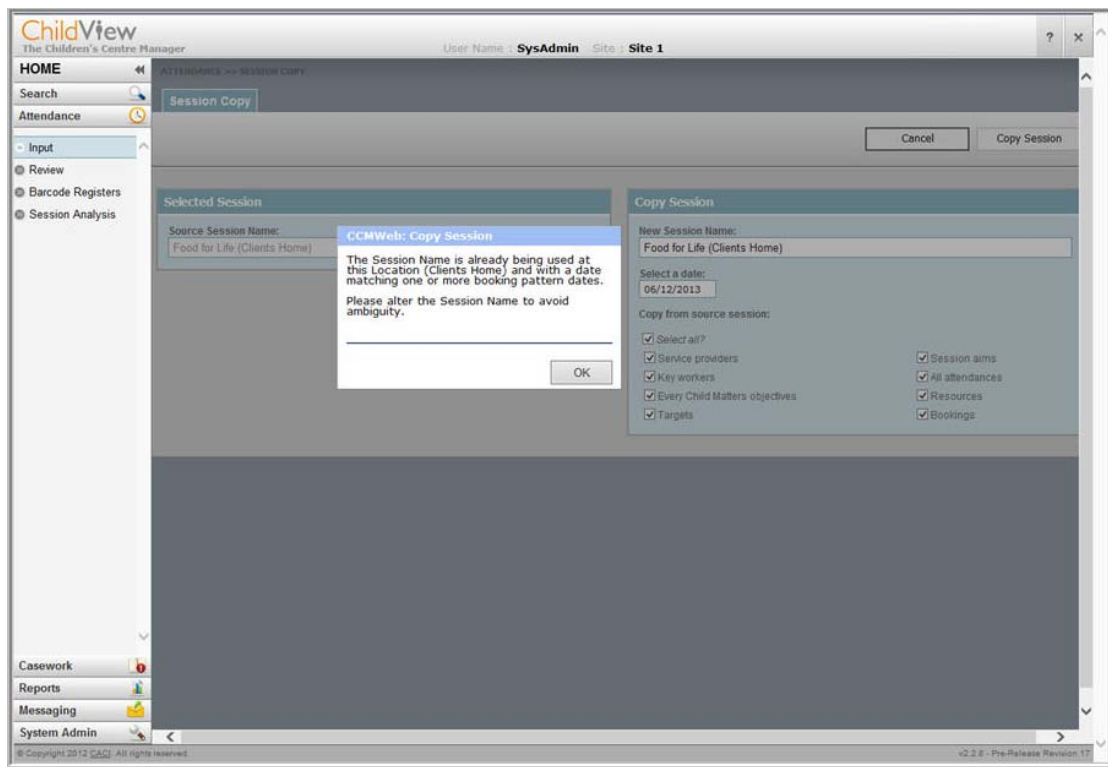
The screenshot shows the 'Attendance Input' screen in ChildView. At the top, there's a search bar and a dropdown for 'Please select an Activity' set to 'Food for Life'. Below this is a table titled 'Select Session' with columns: Session Name, Session Date, Attendees, Bookings, Max Capacity, and Spaces Remaining. The table lists three sessions: 'MONTHLY Food for Life MONTHLY', 'Food for Life (Clients Home)' on 02/12/2013, and 'Food for Life (Clients Home)' on 09/12/2013. At the bottom, a toolbar contains buttons: 'Manage Bookings', 'Manage Attendances', 'Copy Session' (highlighted), 'New Session', 'Edit Session', 'Delete Session', 'Cancel Session', 'Generate Register', 'Message Key Workers', and 'Group Key Workers'.

Pressing the 'Copy Session' button will open the following screen:

The screenshot shows the 'Session Copy' screen in ChildView. It has a 'Source Session Name' field with 'Food for Life (Clients Home)' entered. To the right, there's a 'Copy Session' section with a 'New Session Name' field (also containing 'Food for Life (Clients Home)'), a 'Select a date' field (showing '02/12/2013'), and a 'Copy from source session' section with checkboxes for 'Select all?', 'Service providers', 'Key workers', 'Every Child Matters objectives', 'Targets', 'Session aims', 'All attendances', 'Resources', and 'Bookings'. All checkboxes are checked. At the top right, there are 'Cancel' and 'Copy Session' buttons. The bottom toolbar is the same as the previous screen.

- You can now specify a new date for the session as well as specify which bits of information you wish to copy.
- Once you have done this press the 'Copy Session' button to create your new session.

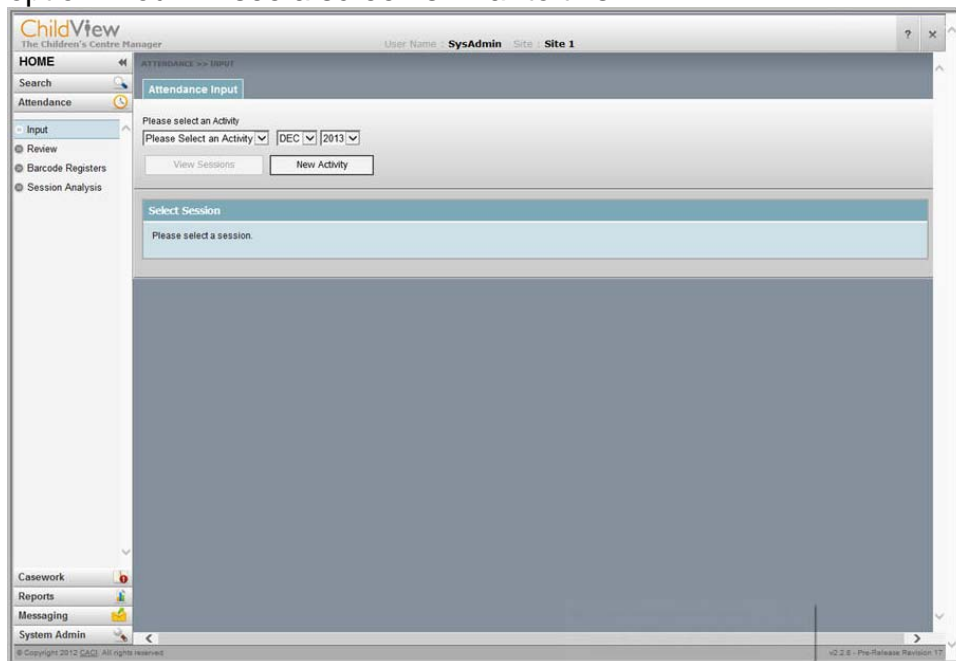
You will be warned if an existing session is already in the system for the new session date specified:



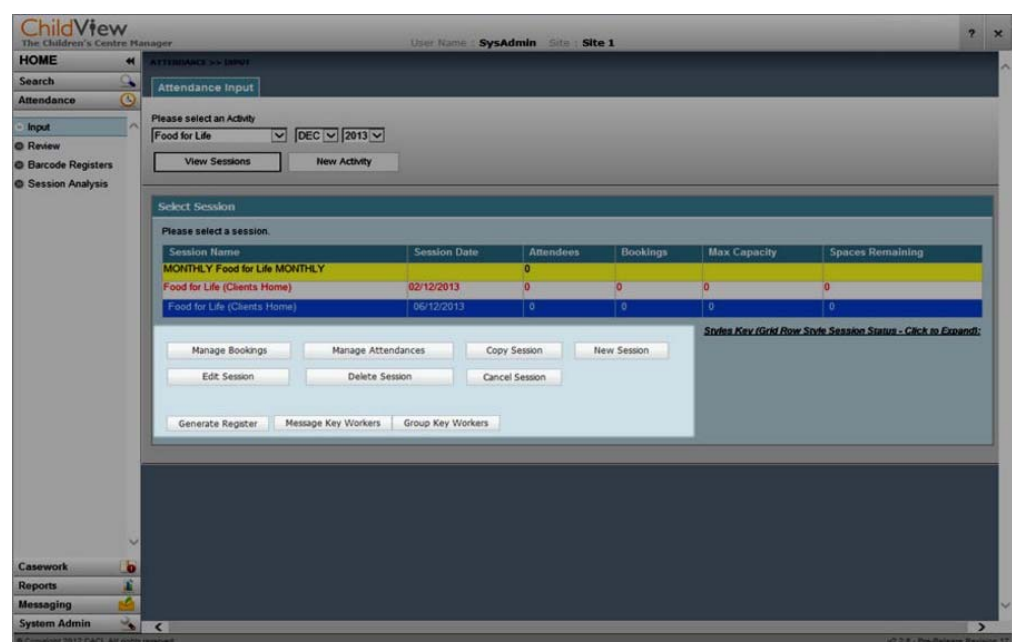
1.6. Editing sessions

It is possible to edit the details of an existing session.

1. From the Side Menu, click the Attendance menu, then click the Input option. You will see a screen similar to this:

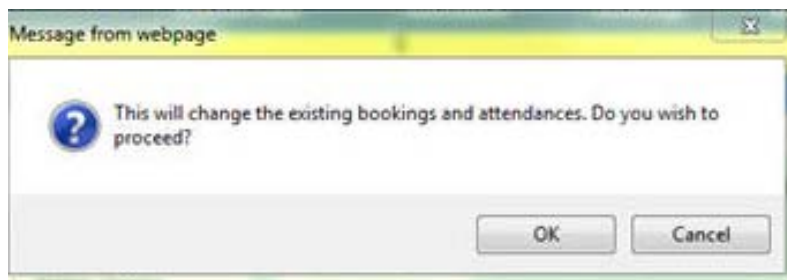


2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.
3. Clicking on the Session of that you wish to edit will enable the buttons at the bottom of the screen:



Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Food for Life MONTHLY		0			
Food for Life (Clients Home)	02/12/2013	0	0	0	0
Food for Life (Clients Home)	06/12/2013	0	0	0	0

You will be prompted with the following dialog:



This informs you that any updates you make to the session details will filter through to any bookings or attendances already set up in the system.

Press the 'OK' button if you wish to proceed.

You will now be presented with the session details which can be viewed or modified as required.

1.7. Cancelling sessions

It is possible to cancel an existing session provided that it has no associated attendance records.

Note: you should record all planned sessions, and cancel them on the system if there were no session attendees.

1. From the Side Menu, click the Attendance menu, then click the Input option.
2. Select an Activity type from the drop down box along with the month & year the session is due to take place, and press the 'View Sessions' button.
3. Clicking on the Session of you wish to edit will enable the buttons at the bottom of the screen. Press the 'Cancel Session' button.
4. A screen similar to the following will be displayed:

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Site 1

HOME
Search
Attendance
Input
Review
Barcode Registers
Session Analysis

ATTENDANCE >>> CANCEL SESSION
CANCEL SESSION

Food for Life (Clients Home) Activity : Food for Life on : 17 Dec 2013 at : Clients Home

Pattern - Show/Hide Help Information -
☐ Cancel all in the pattern ☒ Cancel Selected sessions

	Date	From	To	Bookings	Key Workers
<input type="checkbox"/>	02 Dec 2013			0	0
<input checked="" type="checkbox"/>	17 Dec 2013			0	1

Notification / Reason - Show/Hide Help Information -
Reason for cancellation ☒ All Sites
Cancellation Category
☐ Notify Individuals ☐ Notify Key workers
Message: num chars remaining - 500
Food for Life Cancelled on: 17 Dec 2013; -

Casework
Reports
Messaging
System Admin

BACK CANCEL SESSIONS

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All session that have no associated attendances are listed and the selected session is ticked.

5. If the Cancel button is pressed without selecting a specific session, all sessions within the selected month that have no attendances will be included in the Cancel screen.

6. Select the session(s) that are to be cancelled, enter a new Reason for Cancellation or select an existing reason from current site records or from all sites, select a Cancellation Category from the drop down list and click Cancel Sessions.
7. The cancellation will be confirmed and the Attendance Input screen will be displayed with the cancelled sessions struck through.

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

ATTENDANCE >> INPUT

Attendance Input

Please select an Activity
Food for Life DEC 2013

View Sessions New Activity

Select Session

Please select a session:

Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Food for Life MONTHLY		0			
Food for Life (Clients Home)	02/12/2013	0	0	0	0
Food for Life (Clients Home)	17/12/2013	0	0	0	0

Strikes Key (Grid Row) Strike Session Status - Click to Expand

Manage Bookings Manage Attendances Copy Session New Session

Edit Session Delete Session Cancel Session

Generate Register Message Key Workers Group Key Workers

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If the cancelled session is selected, the Cancel Session button will change to Activate Session.

Section 4: Individual full details

1.1. Individual full details

The Individual Full Details screen (shown either via the Family Search or People Search route) shows the majority of information held on that person. Selecting one of the tabs across the top of the screen will present you with information held about that person relevant to the selection made.

The screenshot shows the 'ChildView' software interface. The top navigation bar includes 'HOME', 'SEARCH PEOPLE', and 'INDIVIDUAL FULL DETAILS'. The left sidebar contains a tree view with 'Family' and 'People' selected. The main content area displays the 'Individual Full Details' for 'Master Henry Martin'. The 'Individual' tab is active, showing fields for Title (Master), Forename (Henry), Middle, Surname (Martin), Known As, Gender (Male), Date of Birth (27/04/2010), Age (3), Status (Active), Start Date (01/04/2010), Telephone, Mobile, Email, and Message Preference. A notes section at the bottom indicates 'num chars remaining - 255'. The bottom of the screen shows a 'Cancel' and 'Save' button.

General information

The panel at the top of the screen shows general information about the individual and is displayed whichever tab has been selected:

This screenshot is identical to the one above, showing the 'ChildView' software interface with the 'Individual Full Details' for 'Master Henry Martin'. The 'Individual' tab is active, displaying the same set of fields and information as the previous screenshot.

Bread crumb

ChildView
The Children's Centre Manager

HOME >> SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS

Individual Full Details

NAME: Master Henry Martin
DATE OF BIRTH: 27/04/2010
START DATE: 01/04/2010
ID: M000512
ADDRESS: 5 Parfield Close, Eastbourne, BN9 9YV, (South Side)
OPEN CASES: NONE

Requirements Attendances Referrals Health Custom Nationality

Individual Personal Details Notes Child Adult Relationships Barcodes Messages

Individual

Title Master Forename Henry
Middle Surname Martin
Known As Gender Male

Date of Birth 27/04/2010 Age 3
Status Active Start Date 01/04/2010
Telephone Mobile
Email Message Preference
Notes : num chars remaining - 255

Cancel Save

Attendance
Casework
Reports
Messaging
System Admin

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The bread crumb allows for an easy way of navigating back to the page you were previously viewing - in this case clicking the 'Search People' link would reload the people search screen showing the filter criteria previously used along with the list of matching individuals.

Tabs

It is possible to add custom data fields to the Individual Full Details screen by using the windows version of the software. Please refer to your System Administrator should you need to capture additional information about individuals that is not catered for by default in the system. Such information can be set up in CCM Windows as Custom Fields and will show up in an 'Extended Fields' area at the bottom of each Tab (see example below).

ChildView
The Children's Centre Manager

HOME >> SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS

Individual Full Details

NAME: Master Henry Martin
DATE OF BIRTH: 27/04/2010
START DATE: 01/04/2010
ID: M000512
ADDRESS: 5 Parfield Close, Eastbourne, BN9 9YV, (South Side)
OPEN CASES: NONE

Individual Personal Details Notes Child Adult Relationships Barcodes Messages

Requirements Attendances Referrals Health Custom Nationality

Referrals

Referrals for: Henry Martin

#	Date	Who	Referred To	Referred By
No data to display				

Extended Fields

Extended Fields: Referrals

Additional Information

Attendance
Casework
Reports
Messaging
System Admin

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The tab options are:

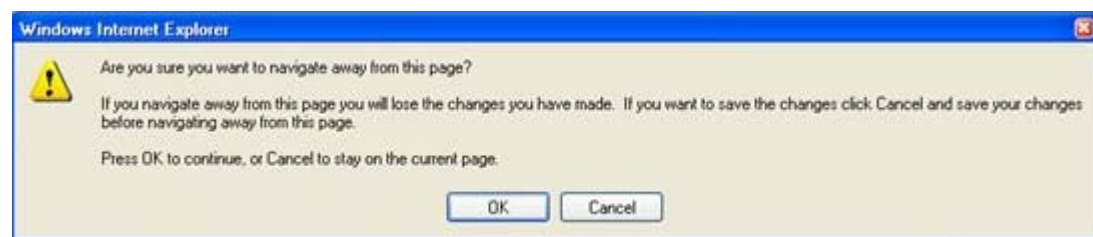
- Individual - overview of personal details
- Personal Details - in depth information
- Notes - both confidential and non-confidential in nature
- Child
- Adult
- Relationships.
- Barcodes - We will start using this in Summer 2014
- Requirements - information about disabilities and special needs
- Attendances
- Referrals
- Health
- Custom - this tab will show any custom fields that are not configured to show on the tabs mentioned
- Nationality
- Messages – We will start using this in Summer 2014

Depending upon your user rights you may or may not see all of these tabs.

Should you wish to edit any of the information held about that person, make the necessary changes, and ensure you press the 'Save' button at the bottom of the screen. The 'Save' button will save changes made in any of the tabs.

The 'Cancel' button will remove any changes you made in any of the tabs, provided you have not pressed the 'Save' button.

If you make changes, then move off of the Individual Full Details screen without pressing 'Save', you'll be asked to confirm the action:



Clicking 'OK' will take you to the selected screen, or 'Cancel' will restore the Individual Full Details screen so that you can save your changes.

1.2. Individual

This tab shows core information about an individual:

The screenshot displays the 'ChildView' software interface. The top navigation bar includes 'HOME', 'SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS', and user information 'User Name: SysAdmin Site: Site 1'. A left-hand menu lists various functions: Family, People, Add Family Wizard, Advanced Search, Service Providers, Mail Merge, and Data Extract. The main content area is titled 'Individual Full Details' and shows information for 'Miss Jade Samuels'. Key details include: NAME: Miss Jade Samuels, DATE OF BIRTH: 26/02/1998, START DATE: 01/01/2001, ID: SAM0162, ADDRESS: 36 Fieldside View, Eastbourne, BC21 2L2, (Outside SureStart), and OPEN CASES: NONE. Below this, there are tabs for Requirements, Attendances, Referrals, Health, Custom, and Nationality. The 'Individual' tab is active, showing a form with fields for Title (Miss), Forename (Jade), Middle, Surname (Samuels), Known As, Gender (Female), Date of Birth (26/02/1998), Age (15), Status (Active), Start Date (01/01/2001), Telephone (123456789), Mobile, Email (jsamuels@test.com), Message Preference, and a Sample Note field. At the bottom right of the form are 'Cancel' and 'Save' buttons. The footer of the window shows '© Copyright 2012 CACI All rights reserved' and 'v2.2.8'.

Status

This field allows you to record the status of the individual in the Child's Centre. An Active setting can be used to indicate that the individual is currently using the centre's facilities. Should you need to classify somebody as deceased then it is recommended that you use the mortality section in the health tab to record this information as additional information can be captured at this time.

Notes

This field will allow you to store notes up to 255 characters in length. Should you need to store additional information (including confidential information) please use the extended notes functionality as described in Section 4 Individual full details, section 7.5.

Message Preference

This field is used to store the preferred method of messaging if known (Email or SMS). This feature will be available in Summer 2014.

1.3. Personal details

This tab shows in depth personal information about the individual e.g. registered status, consent information etc

The screenshot shows the 'ChildView' software interface. The top navigation bar includes 'HOME', 'SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS', and user information 'User Name: SysAdmin Site: Site 1'. The left sidebar contains a menu with options like 'Family', 'People', 'Add Family Wizard', 'Advanced Search', 'Service Providers', 'Mail Merge', and 'Data Extract'. The main content area is titled 'Individual Full Details' and shows personal information for 'Miss Jade Samuels', including her date of birth (26/02/1998), start date (01/01/2001), ID (SAM0162), and address (36 Fieldside View, Eastbourne, BC21 2L2, (Outside SureStart)). Below this, there are tabs for 'Requirements', 'Attendances', 'Referrals', 'Health', 'Custom', and 'Nationality'. The 'Personal Details' tab is active, showing a form with sections for 'Identifying Details', 'Consent', and 'Verification'. The 'Identifying Details' section includes fields for 'NH Number', 'NI Number', 'Registered' (checked), 'Local Indicator' (unchecked), 'Site Registered At' (Site 1), and 'Main Correspondent' (unchecked). The 'Consent' section includes 'Non CC Mail Shots' (checked), 'Photo Permission' (unchecked), and 'Video Permission' (unchecked). The 'Verification' section includes fields for 'Name Verified By', 'DOB Verified By', and 'Gender Verified By', each with a dropdown menu set to '[No Selection Made]', and 'Verified On' dates.

Registered

This field refers to whether the individual has returned a signed registration form.

Please note: This should not be ticked if you have received the family's details through the new birth data form. See Section 2: Search Menu, section 5.9 on adding new birth data.

Site Registered At

This field refers to the centre where the individual first registered at i.e. where they physically handed in their registration form.

Local Indicator

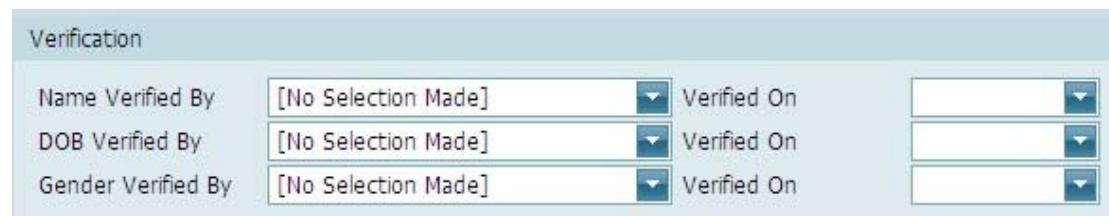
We do not use this indicator in Barnet.

Non CC Mail shots

It is a requirement of the Data Protection Act that you seek permission from the family before you or any other agency should contact them with information not directly relevant to the Children's Centre operation. Any individuals declining this permission must have this drop down set to no.

Verification fields

If a verification field has not been set you will see the following screen:



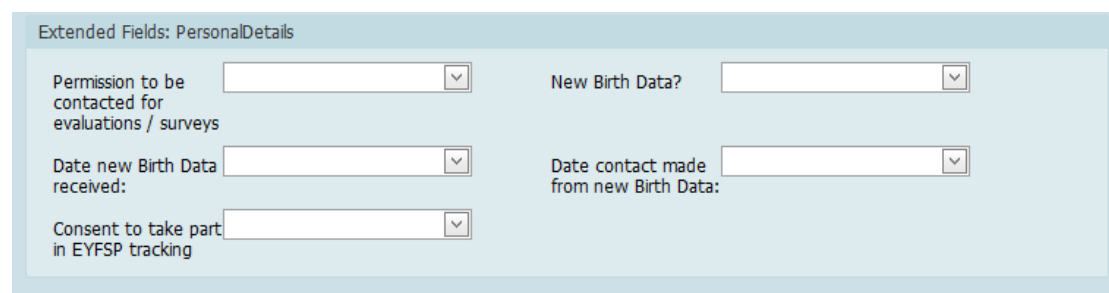
The screenshot shows a form titled 'Verification' with three rows. Each row has a label, a dropdown menu, and a date field. The labels are 'Name Verified By', 'DOB Verified By', and 'Gender Verified By'. Each dropdown menu currently shows '[No Selection Made]'. To the right of each dropdown is a date field with a dropdown arrow, each labeled 'Verified On'.

Click the applicable entry in the relevant drop down box as well as the date the verification took place. If you do not select a date then 'today's' date will be used.

Note: You are unable to delete a verification field once it has been entered on the system. However should the entry have been made in error you can select the 'None or Remote' option to indicate this.

Extended fields

The extended fields are local to the Barnet system.



The screenshot shows a form titled 'Extended Fields: PersonalDetails'. It contains six dropdown menus arranged in two columns. The left column has labels: 'Permission to be contacted for evaluations / surveys', 'Date new Birth Data received:', and 'Consent to take part in EYFSP tracking'. The right column has labels: 'New Birth Data?', 'Date contact made from new Birth Data:', and an empty label. Each dropdown menu is currently empty.

Please note: If you have received the family's details through the new birth data leaflet, the three new birth data fields should be completed. See Section 2: Search menu, section 6.9 on adding new birth data.

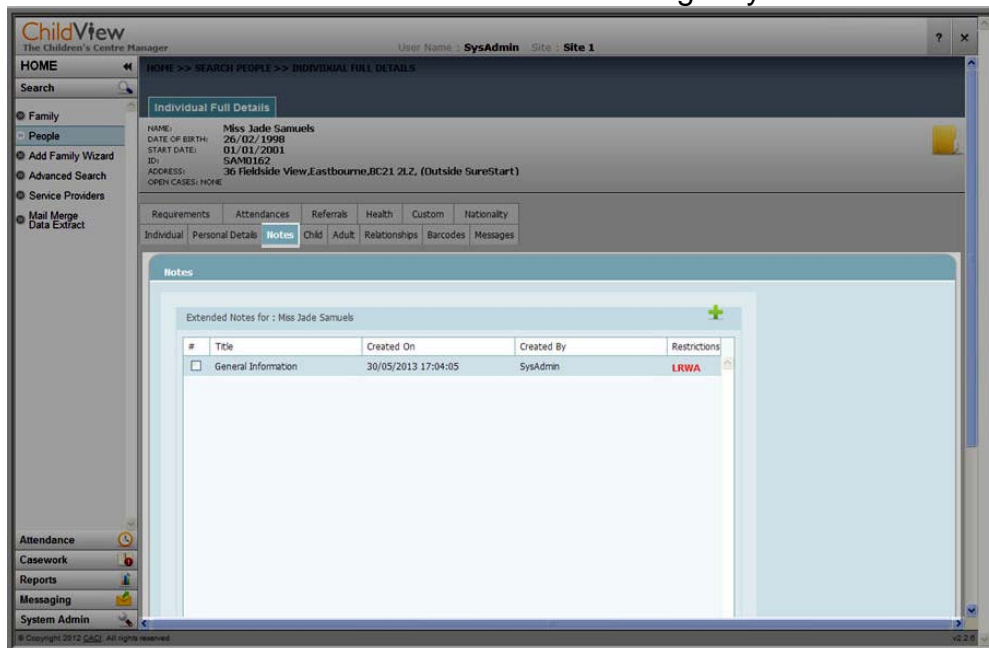
1.4. Notes

The Notes tab allows you to store information that exceeds the 255 character limit in the Notes section on the Individual and Personal Details tabs.

Notes can also contain formatting, for example different fonts, bulleted lists, URL Links etc.

It is also possible for you to make an extended note confidential in nature, and you can assign specific confidential permission groups the rights to access the confidential note.


Any extended note for an individual will show on the screen along with an indication in the Restrictions column as to the rights you have over that note:

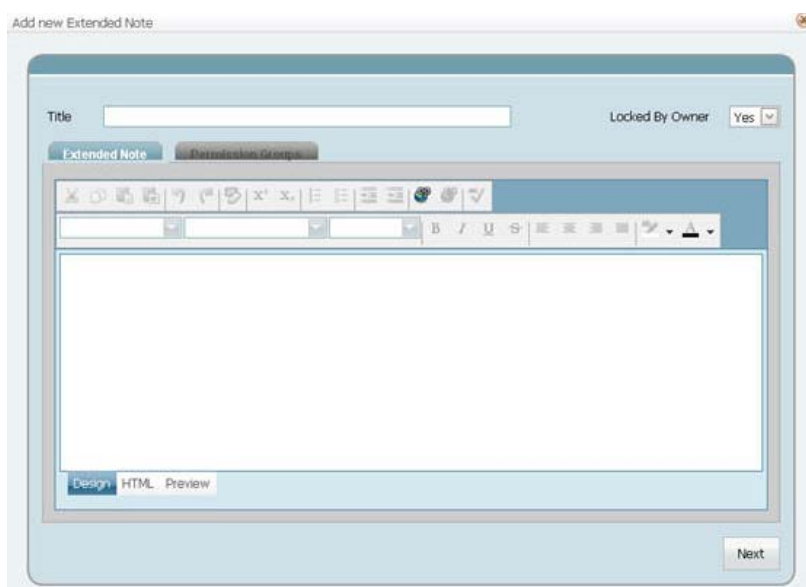


L = Locked by owner
R = Read
W = Write
A = Archive

Clicking on the column headers will undertake A-Z, Z-A order of the information shown.

Adding a new extended note

To add a new extended note press the  icon which will display a screen similar to the following:



When recording the note title you should use the following format:

Note type – note subject – Children's Centre

For example:

Telephone call – Breastfeeding advice – Barnfield

This is to allow queries to be run on the reports.

Please note: Telephone calls and correspondence can be used to demonstrate sustained contact with families.

Note: The Permission Groups tab will only show if your user profile has the rights to create confidential notes.

You can now type in your text and format this as needed using the various icons that are presented.

For reference pressing the enter key will start a new paragraph of text. If you only wish to add a line break then press a combination of the shift key and enter.

Note: any images copied will not be saved in the database - the extended notes field is only relevant for textual information.

Should you wish to prevent other users from editing the text then set the 'Locked by Owner' drop down to Yes:

Add new Extended Note

Title: General Information Locked By Owner: Yes

Extended Note

History

Harry was referred to us by Citizens Advice and has taken an active role in the centre since he joined.

Main activity interests

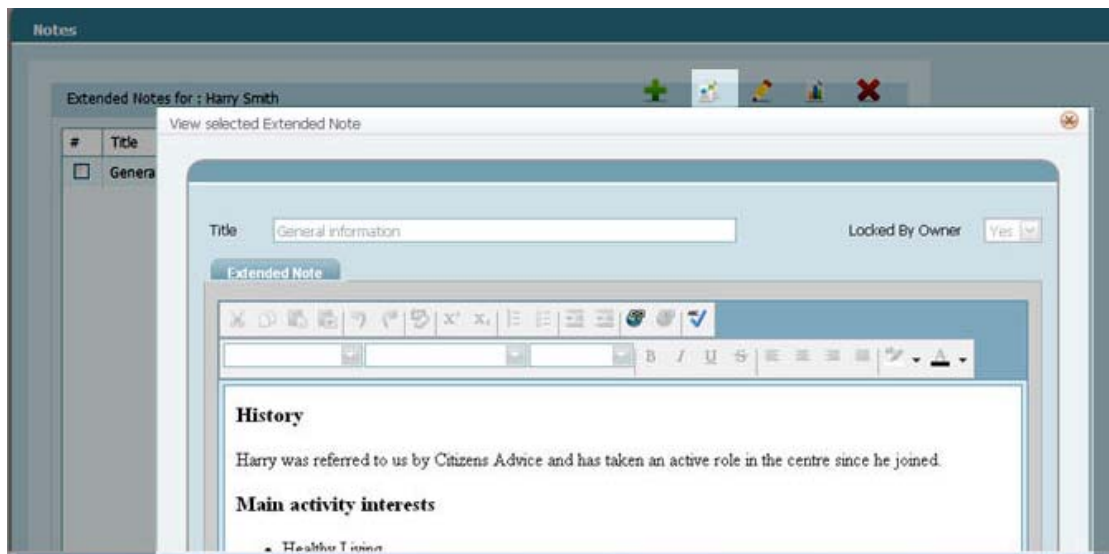
- Healthy Living
- Language and Play
- Adult Street Dance

Design HTML Preview

Save

Viewing a note

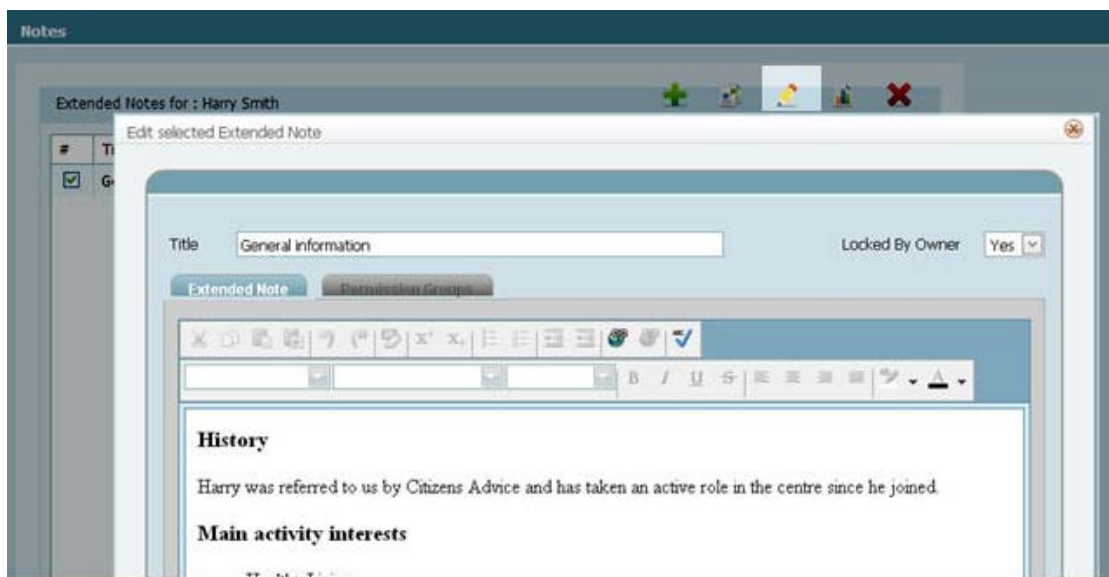
To view an existing note select the applicable entry in the extended notes grid and then click on the view extended note icon that will become available:



Note: If you wish to be able to click on the urls in the document then you need to ensure that the 'Preview' button at the bottom of the extended note dialog screen has been clicked.

Modifying a note

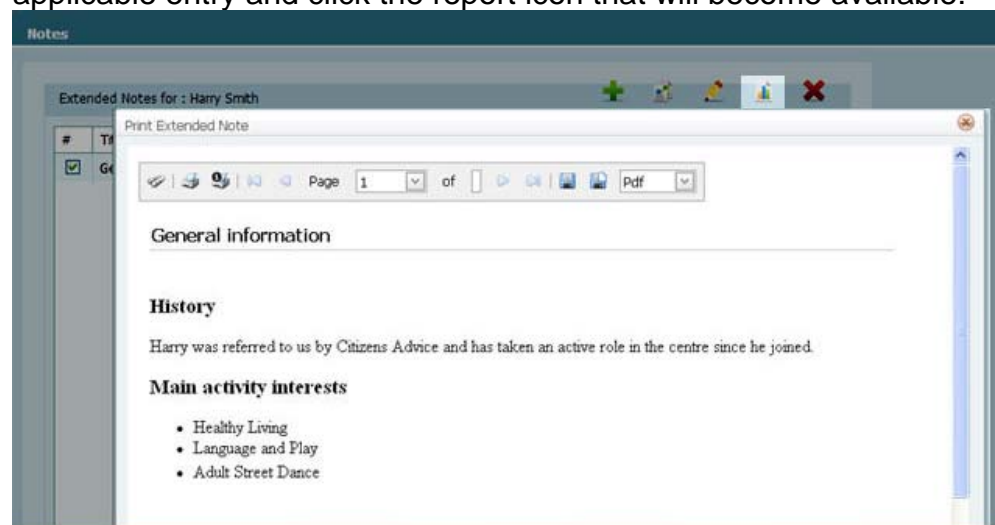
To modify an existing note select the applicable entry in the extended notes grid and then click on the modify extended note icon that will become available:



The note has not been locked by the owner the 'Save' button will be enabled which will allow you to save any changes made to the note.

Printing or saving a note

If you wish to print or save an extended note to your computer select the applicable entry and click the report icon that will become available:

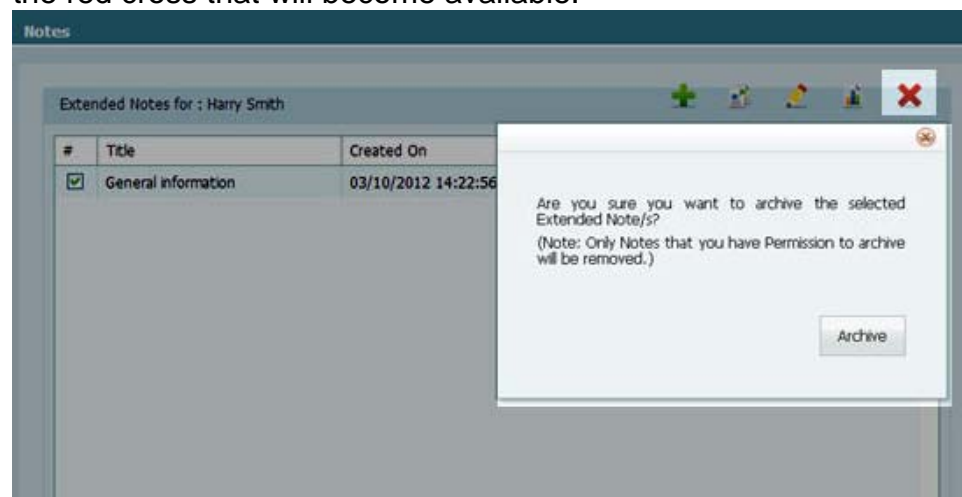


Once the Print Extended Note screen has shown press the relevant button in the toolbar at the top of the screen.

Archiving an extended note

You are unable to delete an extended note from the database, instead authorised users can archive an extended note.

If you wish to archive an extended note select the applicable entry and click the red cross that will become available:



Once you have confirmed that you wish to archive the note nobody will be able to view it.

Note: If the note has been locked by the owner you will not be able to archive it.

1.5. Child tab

This tab provides information about a child's status i.e. birth, breastfeeding and childcare needs etc.

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME >> SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS

Individual Full Details

NAME: Master Peter Price
DATE OF BIRTH: 11/11/2007
START DATE: 01/06/2010
ID: P000543
ADDRESS: 105 Mallard Road, Eastbourne, BN12 3CV, (South Side)
OPEN CASES: NONE

Requirements Attendances Referrals Health Custom Nationality

Individual Personal Details Notes **Child** Adult Relationships Barcodes Messages

Child Details

Birth Details

Lbs 0 Oz 0 Kg 0

Gestation Period (wks) 0

Breast Feeding

At Birth ☐ At 6 Weeks ☐ At 4 Months ☐

Childcare Needs

Caring For Parent ☐ Caring For Sibling(s) ☐

Attends a Nursery ☐ Nursery Manager ☐ UPN


Cancel Save

Attendance Casework Reports Messaging System Admin

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Birth Details

The database stores birth weight in Metric units (kg) and as such you need to ensure that the Kg field at the right of the screen has an entry.

If you only have English birth weight information then you can enter this in the relevant fields and click on the converter icon  to get an applicable entry in the Kg field.

Extended fields

The extended fields are local to the Barnet system.

Extended Fields: Child

CAF CAF No.

CIN CPP

Emergency Contact ICS No.

LAC

Please note: CIN, CPP and LAC information feeds into performance reports.

1.6. Adult tab

This menu option shows general information about the status of an adult e.g. parent status, employment status etc. The fields shown will vary slightly according to gender of the individual.

The image below shows details for an adult male:

The screenshot shows the 'Adult Details' form for an adult male. The 'Adult' tab is selected in the top navigation bar. The form includes the following fields and options:

- Parent Or Carer:** ☒
- Lone Parent:** ☒
- Teenage Parent:** ☐
- Smoker:** ☒
- Employment:**
- Unique Tax Ref:**
- Driving Licence:**
- Electoral Role Ref:**

The image below shows the details for an adult female:

The screenshot shows the 'Adult Details' form for an adult female. The 'Adult' tab is selected in the top navigation bar. The form includes the following fields and options:

- Parent Or Carer:** ☒
- Lone Parent:** ☐
- Teenage Parent:** ☐
- Pregnant:** ☐
- Smoker:** ☒
- Employment:**
- Unique Tax Ref:**
- Driving Licence:**
- Electoral Role Ref:**

Pregnant

Setting the pregnant drop down box to yes will cause the Due Date field to become visible:

The screenshot shows the 'Adult Details' form for an adult female with the 'Pregnant' field set to 'Yes'. The 'Adult' tab is selected in the top navigation bar. The form includes the following fields and options:

- Parent Or Carer:** ☒
- Lone Parent:** ☐
- Teenage Parent:** ☐
- Pregnant:** ☒
- Due Date:**
- Smoker:** ☒
- Employment:**
- Unique Tax Ref:**
- Driving Licence:**
- Electoral Role Ref:**

You can either directly enter the due date in to the date field or use the calendar widget which will show if you click on the drop down arrow.

Extended fields

The extended fields are local to the Barnet system.

Extended Fields: Adult

Benefits

☐ Income Support (IS)
☐ Job Seekers Allowance (JSA)
☐ Employment and Support Allowance
☐ State Pension

Does anyone in your household smoke?

How did you hear about us?

Are you planning to breast-feed?

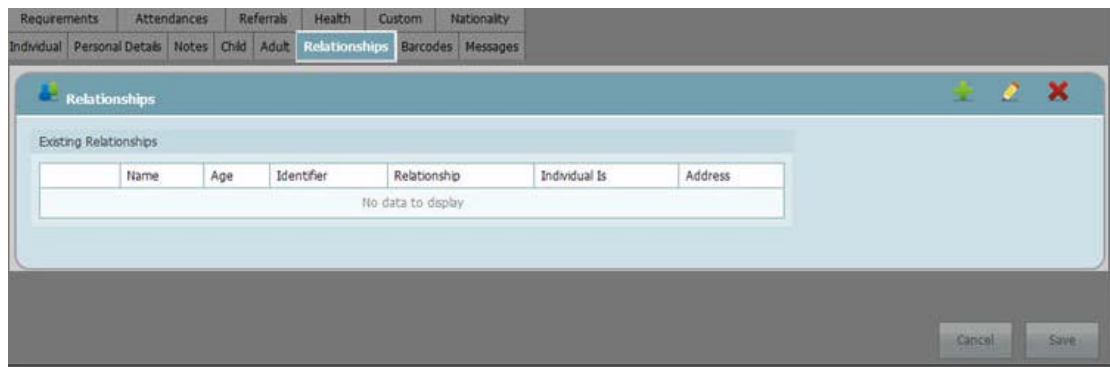
Registered Child Minder

Sexual Orientation

1.7. Relationships


This tab details any family relationships that may have been set (see Section 6: Add family wizard, section 6.5 for information on how to set up family relationships when individuals are entered in the database).

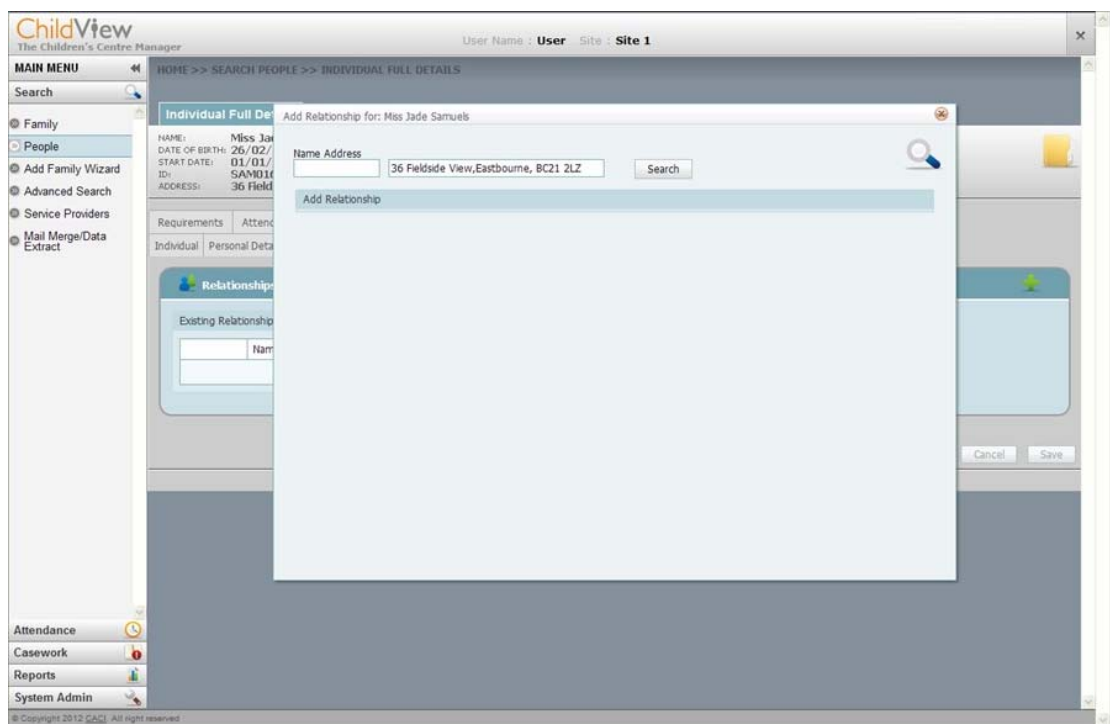
The screen shot below shows that no relationships have been set for the selected individual:



The screenshot shows the 'Relationships' tab selected in a software interface. The tab is part of a larger window with other tabs like 'Requirements', 'Attendances', 'Referrals', 'Health', 'Custom', 'Nationality', 'Individual', 'Personal Details', 'Notes', 'Child', 'Adult', 'Barcodes', and 'Messages'. The 'Relationships' tab contains a section titled 'Existing Relationships' with a table that has columns for Name, Age, Identifier, Relationship, Individual Is, and Address. The table is empty, displaying 'No data to display'. At the bottom right of the window are 'Cancel' and 'Save' buttons.

Creating new relationships

For our example we wish to establish the relationship between Jade Samuels (the individual whose full details we are viewing) and her father Ruben Samuels. Click the  icon to open the Add relationship screen:



The screenshot shows the 'Add Relationship' screen in the software interface. The screen is titled 'Add Relationship for: Miss Jade Samuels'. It has a search bar with the text 'Name Address' and a search button. Below the search bar is a table with columns for Name, Address, and Relationship. The table is empty. At the bottom right of the window are 'Cancel' and 'Save' buttons. The background shows the 'Individual Full Details' screen for Miss Jade Samuels, with fields for Name, Date of Birth, Start Date, ID, and Address. The 'Relationships' tab is also visible in the background.

By default the address where the individual lives will populate the Address field. If the person we are setting up a relationship with does not live at the

same address you can enter alternative search criteria in the Name & / or Address field.

Press the 'Search' button to undertake a search. A number of names will now show on the screen if a match has been found:

The screenshot shows a software window titled "Add Relationship for: Miss Jade Samuels". At the top, there is a search bar with the text "Name Address" and a "Search" button. Below the search bar, a table titled "Add Relationship" displays search results. The table has five columns: Name, Address, Date Of Birth, and Identifier. The results list five individuals: Drew Samuels, Jasmine Samuels, Louise Samuels, Peter Smith, and Ruben Samuels, all with the same address: "36 Fieldside View Eastbourne Outside SureStart BC21 2LZ".

Name	Address	Date Of Birth	Identifier
Drew Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jan 31 1977	SAM0160
Jasmine Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 24 2000	SAM0163
Louise Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Aug 9 1996	SAM0161
Peter Smith	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 2 1973	S00352
Ruben Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Apr 20 1980	SAM0164

Note: Searching will operate on a wild card basis on any word entered in the search box(es). For example searching for 'J Smith' will return a list of people where somebody has the letter J in their name and has the word Smith in their name

Select the individual you wish to establish a relationship with; in our case Ruben; and an Add Relationship section will now show on the screen:

This screenshot shows the same "Add Relationship" window, but with the "Select Relationship" section visible at the bottom. The table from the previous screenshot is still present. Below the table, there are two dropdown menus. The first is labeled "Ruben Samuels is the" and the second is labeled "Miss Jade Samuels is the". A "Save" button is located at the bottom right of the window.

Name	Address	Date Of Birth	Identifier
Drew Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jan 31 1977	SAM0160
Jasmine Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 24 2000	SAM0163
Louise Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Aug 9 1996	SAM0161
Peter Smith	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 2 1973	S00352
Ruben Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Apr 20 1980	SAM0164

Select Relationship

Ruben Samuels is the Miss Jade Samuels is the

Save

Select the applicable entry from the left drop down box (in our case father) and the system will try and make a match in the second drop down box. Select the applicable entry:

Add Relationship for: Miss Jade Samuels

Name Address

Add Relationship

	Name	Address	Date Of Birth	Identifier
	Drew Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jan 31 1977	SAM0160
	Jasmine Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 24 2000	SAM0163
	Louise Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Aug 9 1996	SAM0161
	Peter Smith	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 2 1973	S00352
	Ruben Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Apr 20 1980	SAM0164

Select Relationship

Ruben Samuels is the Miss Jade Samuels is the

Pressing the 'Save' button confirms the relationship. You can then close the 'Add Relationship' screen if no other relationships needs to be added and view the relationships for the person:

Requirements Attendances Referrals Health Custom Nationality


Individual Personal Details Notes Child Adult **Relationships** Barcodes Messages

Relationships

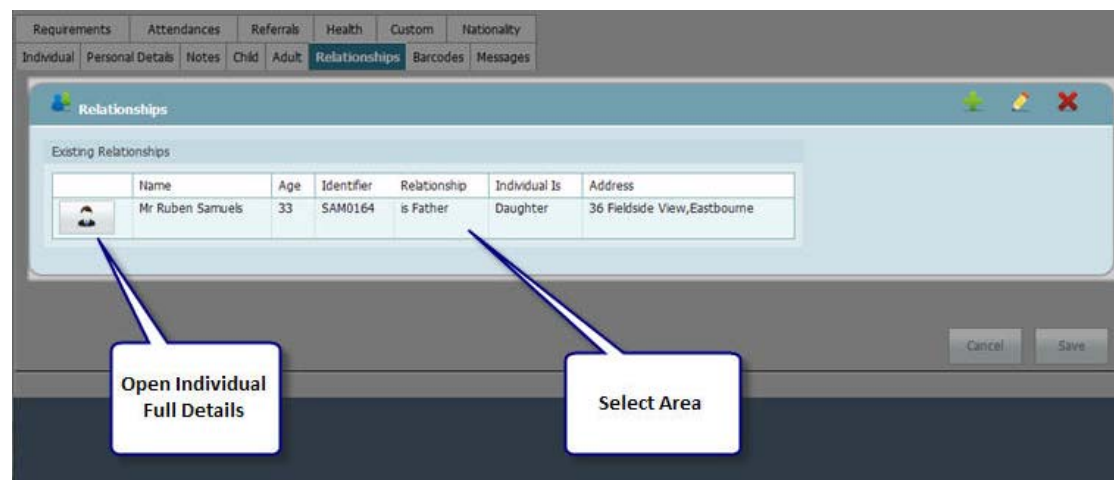
Existing Relationships

	Name	Age	Identifier	Relationship	Individual Is	Address
	Mr Ruben Samuels	33	SAM0164	is Father	Daughter	36 Fieldside View,Eastbourne

Editing relationships

If you wish to edit an existing relationship, click anywhere in the select area (see below) and an edit icon () will become available.

Clicking the Individual icon will open Individual Full Details for the selected individual.

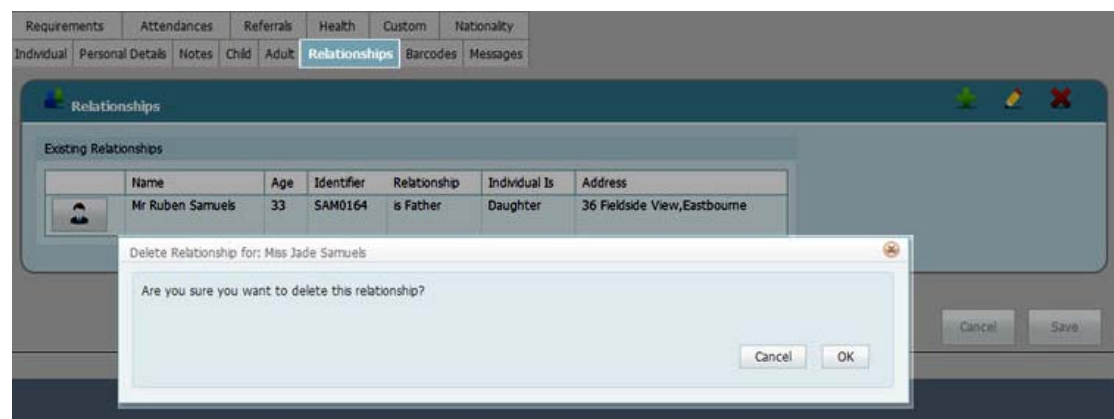


Pressing the edit icon will then open a dialog screen where you can change the existing relationship as required.

Deleting relationships

If you wish to delete an existing relationship then select the applicable entry

and a delete icon () will become available:



Click OK' to confirm that you wish to delete the relationship.

1.8. Requirements

Clicking on the Requirements tab allows you to view / modify any requirements for a person as shown below:

The screenshot shows a software interface with a top navigation bar containing tabs: Individual, Personal Details, Notes, Child, Adult, Relationships, Professionals, Barcodes, and Messages. Below this is a sub-navigation bar with tabs: Requirements (selected), Attendances, Referrals, Health, Custom, and Nationality. The main content area is titled 'Requirements' and contains two sections: 'Disabilities' and 'Special Needs'. The 'Disabilities' section has a list of checkboxes: Angelman's Syndrome, Arthritis, Asperger Syndrome, and Asthma. The 'Special Needs' section has a list of checkboxes: Early Years Action, Early Years Action Plus, None, and School Action. At the bottom right of the interface are 'Cancel' and 'Save' buttons.

To record a disability or special need against someone's record click on the check box next to the relevant entry. Un-tick the entry to remove a disability or special need.

1.9. Attendances

This tab details any activities that the individual has attended.

The screenshot shows the same software interface as above, but with the 'Attendances' tab selected in the sub-navigation bar. The main content area is titled 'Attendances' and features a table with the following data:

#	Activity	Date	Attendances	Location	Attended at Site	Session Name
	Bumps & Babies	01/10/2012	2		Site 1	

At the bottom right of the interface are 'Cancel' and 'Save' buttons.

Clicking on the column headers will undertake A-Z, Z-A order of the attendance information shown.

1.10. Referrals

Clicking on the Referrals menu option will allow you to add referrals and record outcomes against referrals. Please refer to section 6: Referrals System for details on adding referrals.

The screenshot shows a software interface with a top navigation bar containing tabs: Individual, Personal Details, Notes, Child, Adult, Relationships, Barcodes, Messages, Requirements, Attendances, Referrals (highlighted), Health, Custom, and Nationality. Below the navigation bar is a section titled "Referrals" with a subtitle "Referrals for: Jade Samuels". To the right of the subtitle are a green plus icon and a small bar chart icon. Below this is a table with the following headers: #, Date, Who, Referred To, and Referred By. The table body is empty, and a message "No data to display" is centered below the headers.


1.11. Health


This tab allows you to record health information e.g. are they a smoker, are they deceased, height & weight information etc.

The screenshot shows a software interface with a top navigation bar containing tabs: Individual, Personal Details, Notes, Child, Adult, Relationships, Barcodes, Messages, Requirements, Attendances, Referrals, Health (highlighted), Custom, and Nationality. Below the navigation bar is a section titled "Health". The form contains several input fields and sections: "Body Mass" with fields for Stone, Lbs, Oz, Kg, Feet, Inches, M, and BMI, each with a spin button; a "Calculate" button; "Diagnosed Obese" and "Activity Level" dropdown menus; "Allowed Plasters" and "Post Natal Dpn" checkboxes; "Blood Pressure" with fields for Systolic Hg, Diastolic Hg, and Pulse Per Minute, each with a spin button; "Cholesterol" with fields for LDL and HDL, each with a spin button; "Doctor" dropdown menu and "Family Doctor" button; "Mortality" with a "Deceased" dropdown menu (set to "No") and a "Set as Deceased" button. At the bottom right are "Cancel" and "Save" buttons.

Body Mass

The database will only accept Metric units for weight (Kg) and height (M) as such you need to ensure that the fields at the right of the screen have an entry. If you only have English weight / height information then you can enter

this in the relevant fields and click on the converter icon  to get an applicable entry in the Kg / M fields.

Once the weight and height information have been entered you can click the Body Mass Index (BMI) converter icon  to get a BMI entry.

Note: Although Metric weight & height information is stored in the database you will be able to view the English weight / height information in the respective fields when you view a person's Individual Full Details.

Doctor

This functionality has now been superseded by the professionals tab. See Section 4: Individual full details, section 1.14 for further information.

Mortality

Pressing the 'Set' button will change the deceased status to Yes. Some additional fields will also be displayed where you can capture additional information if needed:



Click the applicable entry in the relevant drop down box.

For the verified field you will also need to specify the date the verification occurred. If you do not select a date then 'today's' date will be used.

Note: You are unable to delete a verification field once it has been entered on the system. However should the entry have been made in error you can select the 'None or Remote' option to indicate this.

Once a person is classified as deceased then their status in the Personal Details tab will automatically change to deceased as well. Should the deceased status have been set in error then setting the status field to Active (or other suitable entry) will resurrect them.

Extended fields

The extended fields are local to the Barnet system.

Extended Fields: Health

Last asked about dentist:	<input type="text"/>	Date of Last Dental Check	<input type="text"/>
MMR1	<input type="text"/>	MMR2	<input type="text"/>
Registered with dentist?	<input type="text"/>		

1.12. Custom tab

This tab show any custom fields that have been configured on the Barnet system. For example:

Individual | Personal Details | Notes | Child | Adult | Relationships | Professionals | Barcodes | Messages

Requirements | Attendances | Referrals | Health | **Custom** | Nationality

Custom Fields

Extended Fields: Misc

Would you be interested in any of the following:

- ☐ (001) A childcare place for you
- ☐ (002) Breast-feeding support
- ☐ (003) Help towards getting a job
- ☐ (004) Help with family issues at home

Cancel Save

1.13. Nationality

This tab allows you to record a person's nationality, ethnicity, asylum status etc.

Individual | Personal Details | Notes | Child | Adult | Relationships | Barcodes | Messages

Requirements | Attendances | Referrals | Health | Custom | **Nationality**

Nationality

Nationality

Ethnicity	<input type="text" value="White-British"/>	Religion	<input type="text"/>
English Spoken	<input type="text" value="Unknown"/>	Country of Origin	<input type="text"/>
Language Spoken	<input type="text" value="Unknown"/>	Family Language	<input type="text" value="Set"/>
Asylum Seeker	<input type="text" value="No"/>	Asylum Status	<input type="text"/>

Asylum

Port of Entry	<input type="text"/>	Date of Entry	<input type="text"/>
---------------	----------------------	---------------	----------------------

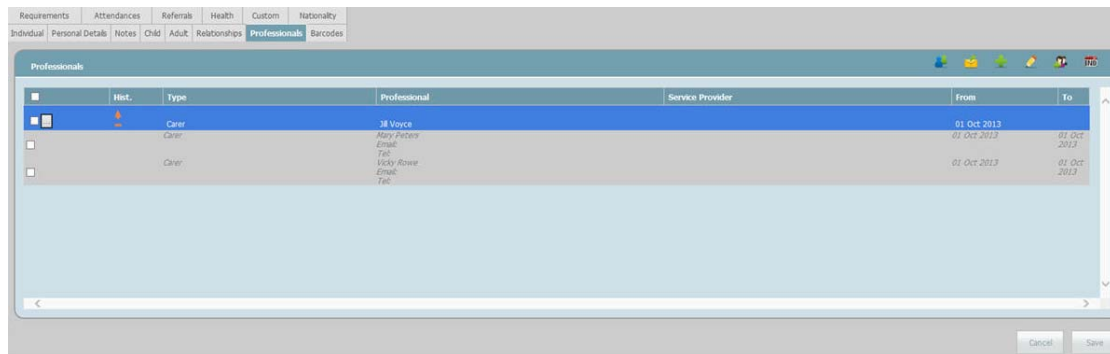
Cancel Save

Pressing the 'Set' button will set the entry in the Language Spoken field to be applicable to all people who live at the address. The change will only take place once the 'Save' button has been pressed.

1.14. Professionals

The Individual Full Details includes a tab for Professionals.

When the 'Professionals' tab is selected a screen similar to the illustration below is displayed. The functionality available here is exactly the same as described in Section 2: Search menu, section 3.1.1 for further information.



Hint	Type	Professional	Service Provider	From	To
	Carer	M. Joyce		01 Oct 2013	
	Carer	Mary Peters		01 Oct 2013	01 Oct 2013
	Carer	Vicky Rowe		01 Oct 2013	01 Oct 2013

Section 5: Archiving

1. Archiving introduction

Archiving is the method used within the database to 'de clutter' the records, so that only relevant, active families stay on view to the users.

Important note: archiving is carried out on a 'whole family' basis.

The database uses its convention of assuming that a Group of people who live at the same address are a 'family'. So, if there is a family of, say, 5 people at an address, and one child reaches an age that is too old to be caught in your children's centre 'umbrella', it is not possible to archive that child alone. The whole family would have to be moved to the archives, or else, the family needs to stay in the current records, despite the fact that one child no longer fits the criteria for membership of the children's centre. This ensures that users see the 'whole family picture'. There may still be children in the family who can attend the children's centre activities, and therefore, it would be useful for users to have as much information as possible to hand about that family unit.

All the information that is visible in the current view is visible in the archives.

Families that have been archived can be moved back into the current records easily. Therefore, if a new child is born in a family that has been archived, the whole family unit can be reinstated in the current records and the new child added.

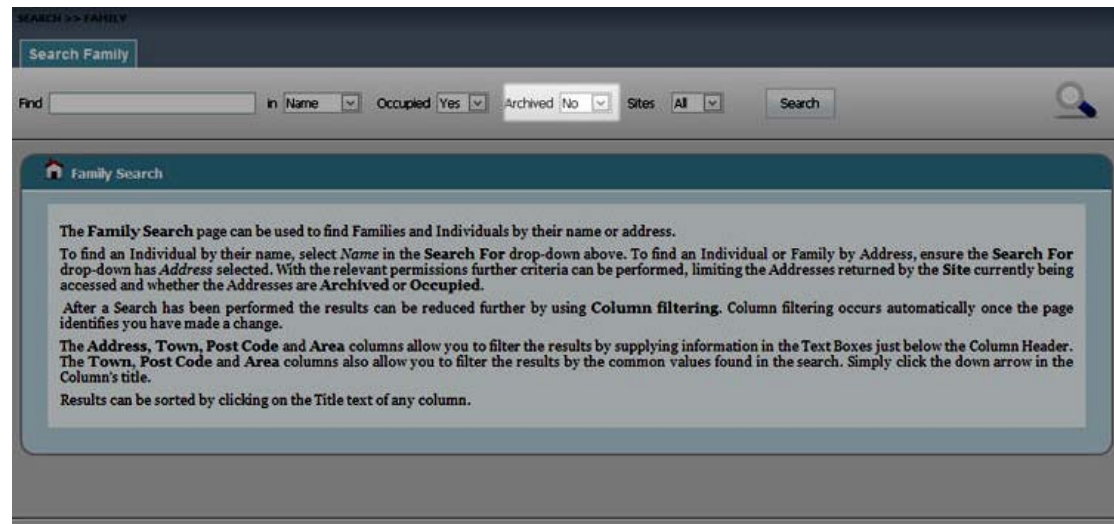
Search filters work the same, regardless of whether archived or non-archived options have been selected.

Please refer to section 5 in the CCM Framework for further information on archiving records.

2. Selecting non-archived or archived records

2.1. Family Search screen

From the Search / Family route, click on the Archived drop down box:

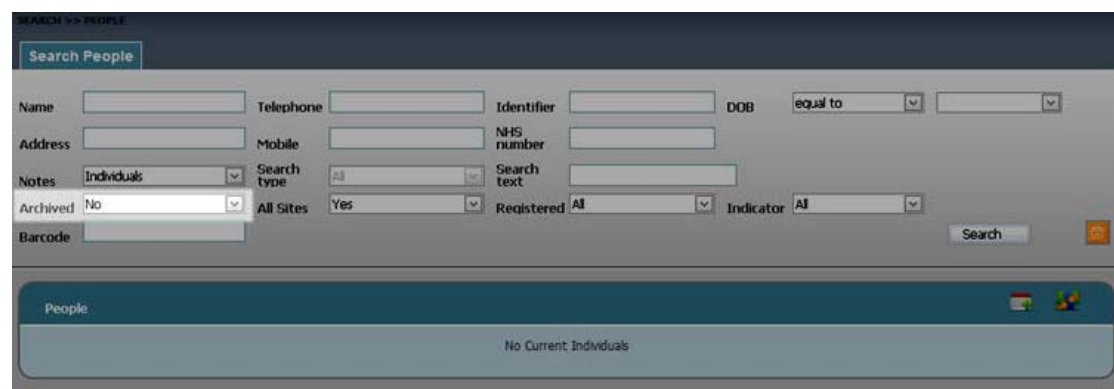


The screenshot shows the 'SEARCH >> FAMILY' interface. At the top, there is a 'Search Family' button. Below it, a search bar contains the text 'Find' followed by a dropdown menu set to 'Name'. To the right of the search bar are several filter dropdowns: 'Occupied' (set to 'Yes'), 'Archived' (set to 'No'), and 'Sites' (set to 'All'). A 'Search' button is located to the right of these filters. Below the search bar, there is a section titled 'Family Search' with a home icon. This section contains instructional text about using the search page, including details on how to filter results by address, column filtering, and sorting.

This drop down box determine if the search is to take place on those addresses that are archived (Archived = Yes), Un-archived (Archived = No) or both (Archived = All).

2.2. People Search screen


From the Search / People route, click on the Archived drop down box:



The screenshot shows the 'SEARCH >> PEOPLE' interface. At the top, there is a 'Search People' button. Below it, there are several search fields: 'Name', 'Telephone', 'Identifier', 'DOB', 'Address', 'Mobile', 'NHS number', 'Notes', 'Search type', 'Search text', 'Archived' (set to 'No'), 'All Sites' (set to 'Yes'), 'Registered' (set to 'All'), and 'Indicator' (set to 'All'). A 'Search' button is located to the right of these fields. Below the search fields, there is a section titled 'People' with a home icon. This section contains the text 'No Current Individuals'.

This drop down box determine if the search is to take place on those addresses that are archived (Archived = Yes) or un-archived (Archived = No).


A padlock icon will show in the search result grid indicating if the selected

person lives at an archived () or un-archived () address.

3. Moving families in and out of the archives


3.1. Using the family search screen

Archiving

1. Click on the 'Search' button in the Side Menu, then click the Family option.
2. Search for the address/family you would like to archive.
3. Click on the relevant address in the address result grid to select it.
4. Click on the open padlock icon () shown in the individual grid. The address (and therefore, its associated family) will be moved into the archived records, and the padlock icon will become closed.


Un-archiving

Should you need to reinstate the family in the active, current view of the database (for example if the family has had a new baby) then do the following:


1. Click on the 'Search' button in the Side Menu, then click the Family option.
2. Ensure the 'Archived' option is selected.
3. Search for the address/family you would like to un-archive.
4. Click on the relevant address in the address result grid to select it.
5. Click the closed padlock icon () shown on the individual grid. The address (and therefore, its associated family) will be moved into the current active records, and the padlock icon will become open.

3.2. Using the People Search screen

Archiving

1. Click on the 'Search' button in the Side Menu, then click the People option.
2. Search for the individual who lives in the family you would like to archive.
3. Click on the relevant individual in the search result grid to select them.
4. Click on the open padlock icon () shown in the search result grid. The address (and therefore, its associated family) will be moved into the archived records.

Un-archiving

1. Click on the 'Search' button in the Side Menu, then click the People option.
2. Search for the individual who lives in the family you would like to un-archive.
3. Click on the relevant individual in the search result grid to select them.
4. Click on the open padlock icon () shown in the search result grid. The address (and therefore, its associated family) will be moved into the current active records.

Section 6: Referrals system

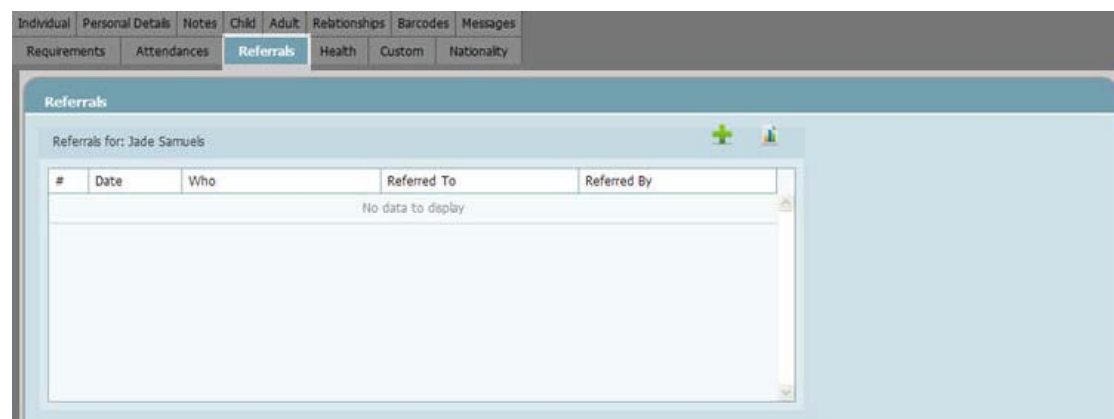
The Referrals System allows you to record and monitor information about people who have been referred to Key Workers, Activities and other Services (including services that are external to your Children's Centre Programme).

Please note: Referrals to FEE2, EYVF, Health Visitors for MMR1 & MMR2 and Smoking Cessation Clinic are all performance indicators and are used in reporting.

1.0 Viewing referrals for an individual

You can view referrals for individuals by doing the following:

1. Bring up the Individuals Full Details screen (see Section 2: Search menu and either the Family Search or People Search topics on how to do this).
2. Select the Referrals tab option to be presented with the following:




Any referral(s) logged against the selected person will now be displayed.


2.0 Viewing referrals for a family

You can display a list of all of the referrals associated with a household by doing the following:

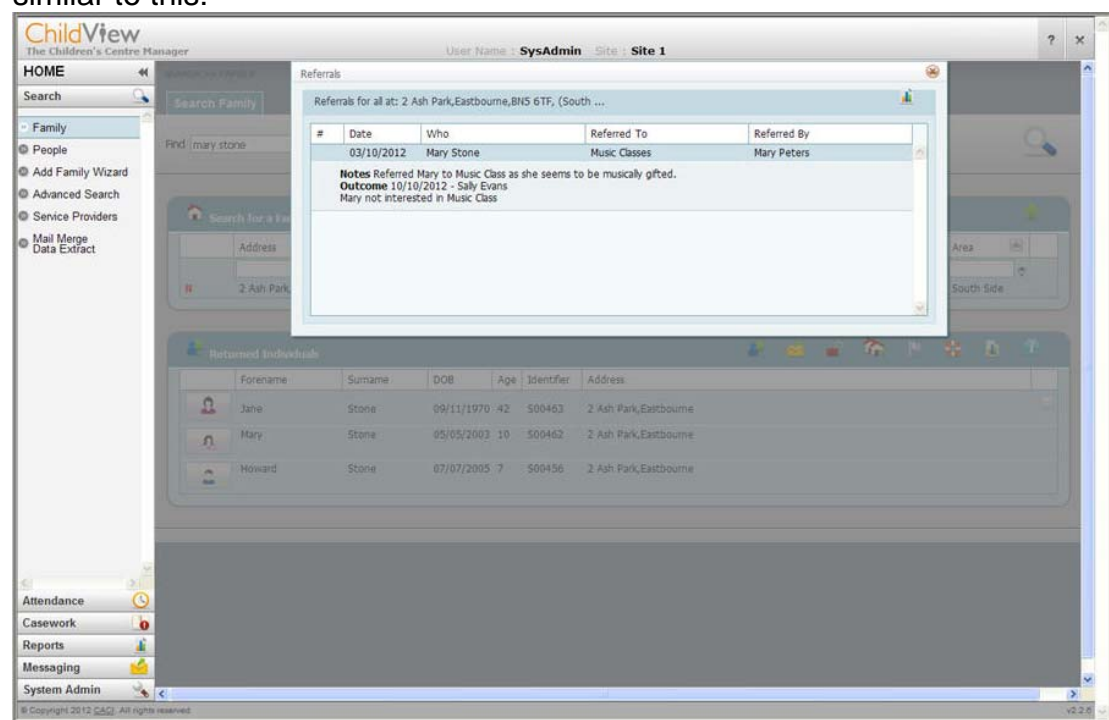
2.1. Via Family Search

1. Click on the Search button in the Side Menu, then click the Family option.
2. Search for the address/family for which you would like to see referrals.
3. Click on the relevant address in the address result grid to select it.
4. Click on the 'Family Referrals' icon () that will show in the individual grid.

2.2. Via People Search


1. Click on the Search button in the Side Menu, then click the People option.
2. Search for the address/family for which you would like to see referrals.
3. Click on the an individual who lives at the address you are interested in to select it.
4. Click on the 'Family Referrals' icon () that will show in the individual grid.

If referrals are in place for any person in that household, you will see a screen similar to this:



3.0 Adding referrals

Referrals are always associated with a single individual and are therefore added to the system within the Referrals tab of the Individuals Full Details screen.

1. Navigate to the individual that you wish to add a referral against and view their Full Individual details (see Section 2: Search menu and either the Family Search or People Search topics on how to do this). Select the Referral tab.
2. Click the  icon to open the Add new Referral screen.

The screenshot shows a software application with a 'Referrals' tab selected. The main window displays 'Referrals for: Jade Samuels' with a table that is currently empty. An 'Add new Referral' dialog box is open in the foreground. The dialog contains the following fields: 'Refer To' (a dropdown menu showing 'Key Worker'), 'By' (a dropdown menu showing 'Gwenda Maughan'), 'Date' (a date picker showing '31/05/2013'), and 'Notes : num chars remaining -' (a text area). At the bottom of the dialog are 'Cancel' and 'Save' buttons.

Refer To

Referrals can be made to either a Key Worker in the programme, a particular Activity, or to a Service. Select the type of referral you wish to make and the drop down list directly below is automatically refreshed with the appropriate options. Select the appropriate item from the drop down list. In this example, we have referred our individual (Reg Harris) to an Activity called Singing Lessons.

By

Every referral must be made by someone. The list that appears in this drop down arrow is the same list as the Key Workers list that will have been created by your system administrator.

Date

Click in the calendar icon located at the right of the date input field, and a calendar will show allowing you to specify the date that the referral was created. This should be set to 'today's' date as it is the start date of the referral and, once set, should not be amended by anyone editing the referral in the future. You can also type in the date if you do not wish to use the calendar.

Notes

This section is intended for you to capture information about why the referral is taking place.

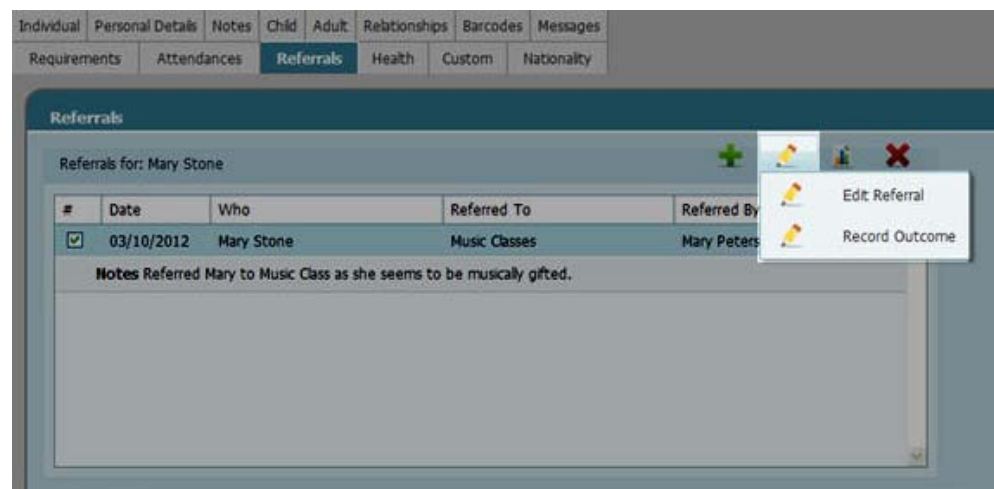
4. When you have completed all the fields mentioned above press the 'Save' button.

4.0 Editing referrals

You can update an existing referral at any time, up until the point that it has an outcome logged against it. Once an outcome is confirmed, referrals are locked (and cannot be further amended), so that any reports and statistics are safe. Referrals can be edited either via the Family search screen, the People search screen or via a persons Individuals Full Details.

To update a referral:

- Click on the 'Family Referrals' icon located in the individual grid of the family search screen once an address has been selected, select a person who lives at the address of interest in the People search screen, or navigate to the referral tab in the person's Individual Full Details.
- Click on the check box located at the left of the referral item, to select it.
- Hover over the pencil icon that will now become visible and select the Edit Referral option that shows in the pop up menu:



- You will then be presented with a screen similar to the following:

- In the Notes field, you can update the previous comments. Do not change the entry in the Date field as that is the date the referral was first raised. You could, instead, type a date in the notes area, as shown above:
- Once you have modified your notes press the 'Save' button to confirm your changes.

5.0 Recording outcomes

When the reason for the referral has been resolved, you can allocate an outcome to it. Once an outcome is confirmed, referrals are locked (and cannot be further amended), so that any reports and statistics are safe.

Outcomes can be recorded via the Individuals Full Details screen, from the Family search screen or from the People search screen.

5.1. Record an outcome

- Click on the 'Family Referrals' icon located in the individual grid of the Family search screen once an address has been selected, select a person who lives at the address of interest in the People search screen, or navigate to the referral tab in the person's Individual Full Details.
- Click on the referral item, to select it.
- Hover over the pencil icon that will now become visible and select the Record Outcome option that shows in the pop up menu:



- You will then be presented with a screen similar to the following:



A screenshot of a 'Record Outcome' dialog box. It contains a 'Confirmed By' dropdown menu with 'Sally Evans' selected. Below it is a 'Notes' text area with the text 'Mary not interested in Music Class' and a character count 'Notes : num chars remaining - 221'. At the bottom is a 'Date' dropdown menu with '31/05/2013' selected. There are 'Cancel' and 'Save' buttons at the bottom right.

Confirmed By

Every outcome must be confirmed by someone. The list that appears in this drop down arrow is the same list as the Key Workers list. This list will have been created by your system administrator.

Notes

Type explanatory notes to explain the outcome.

Date

Choose the date of the outcome by clicking on the calendar icon or manually typing in the date.

- Click the 'Save' button. You will be prompted to confirm that you wish to record the outcome as Referral cannot be edited or removed once an outcome has been added. Press the 'Save' button to confirm the outcome.
- The outcome will then appear in the referral summary table:



A screenshot of the 'Referrals' section in a software interface. It shows a table of referrals for 'Mary Stone'. The table has columns for '#', 'Date', 'Who', 'Referred To', and 'Referred By'. There is one row of data. Below the table, there are sections for 'Notes' and 'Outcome'.

#	Date	Who	Referred To	Referred By
	03/10/2012	Mary Stone	Music Classes	Mary Peters

Notes Referred Mary to Music Class as she seems to be musically gifted.

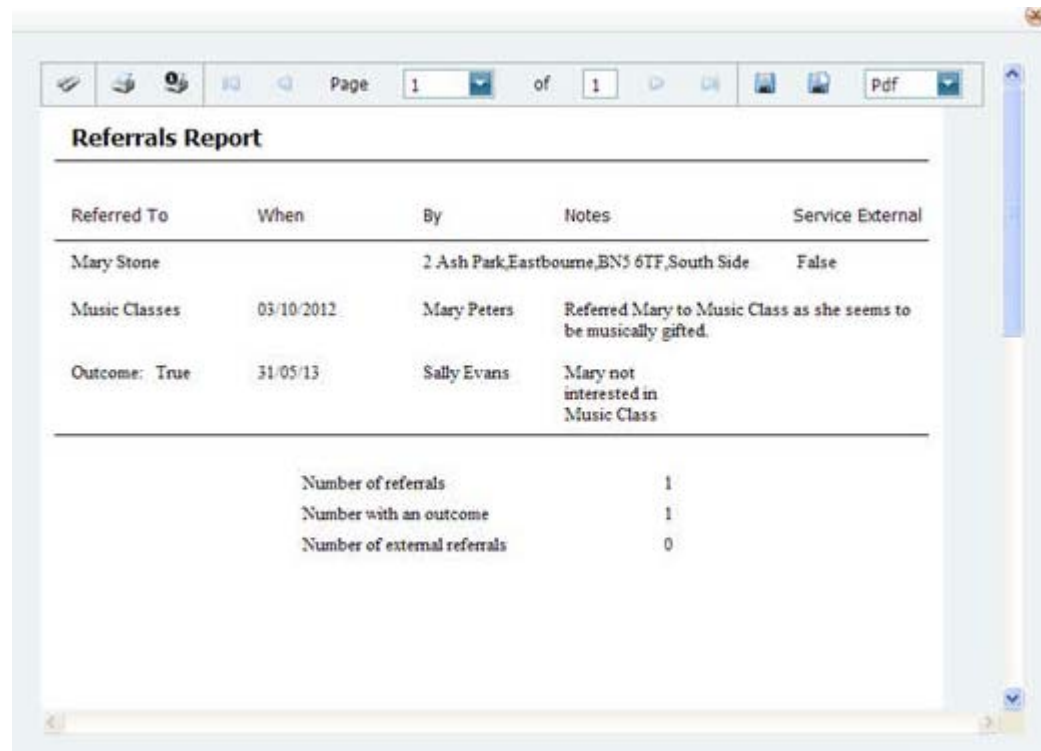
Outcome 31/05/2013 - Sally Evans
Mary not interested in Music Class

6.0 Referral reports

On the individual grid in both the Family search and People search screens, and also the referral tab of an Individuals Full Details is a referral report icon



If you click that icon, a printable list of those referrals will be displayed in a separate window:

A screenshot of a web application window titled 'Referrals Report'. The window has a toolbar at the top with icons for print, save, and other functions, along with a page indicator showing 'Page 1 of 1' and a 'Pdf' button. The main content area contains a table with the following data:

Referred To	When	By	Notes	Service External
Mary Stone		2 Ash Park, Eastbourne, BN1 6TF, South Side		False
Music Classes	03/10/2012	Mary Peters	Referred Mary to Music Class as she seems to be musically gifted.	
Outcome: True	31/05/13	Sally Evans	Mary not interested in Music Class	

Below the table, there is a summary section with the following data:

Number of referrals	1
Number with an outcome	1
Number of external referrals	0

The people included in the report will vary according to which screen you created the report from. If you created the report from the Family Search or People Search screen then all referrals for the family will be included. If you created the report from an Individuals Full Details only their details will be included.