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

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	• Children's Centre management team • CCM Superusers
CCM guide to recording Casework	• 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

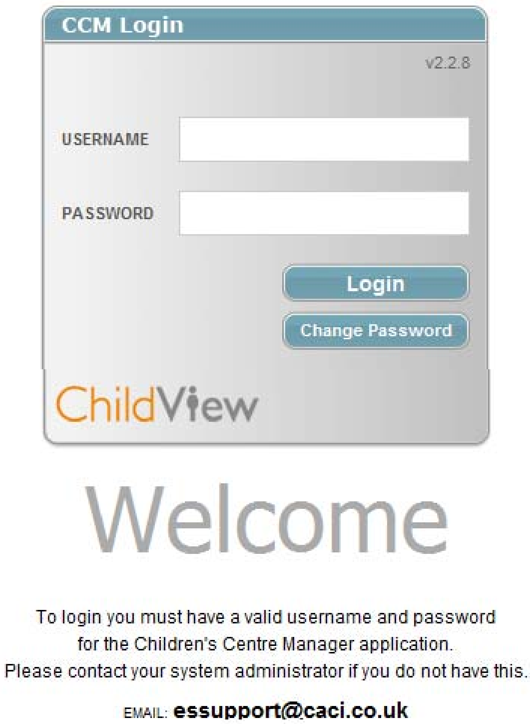
Access to the Children Centre Manager database is through your internet browser.

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:



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

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

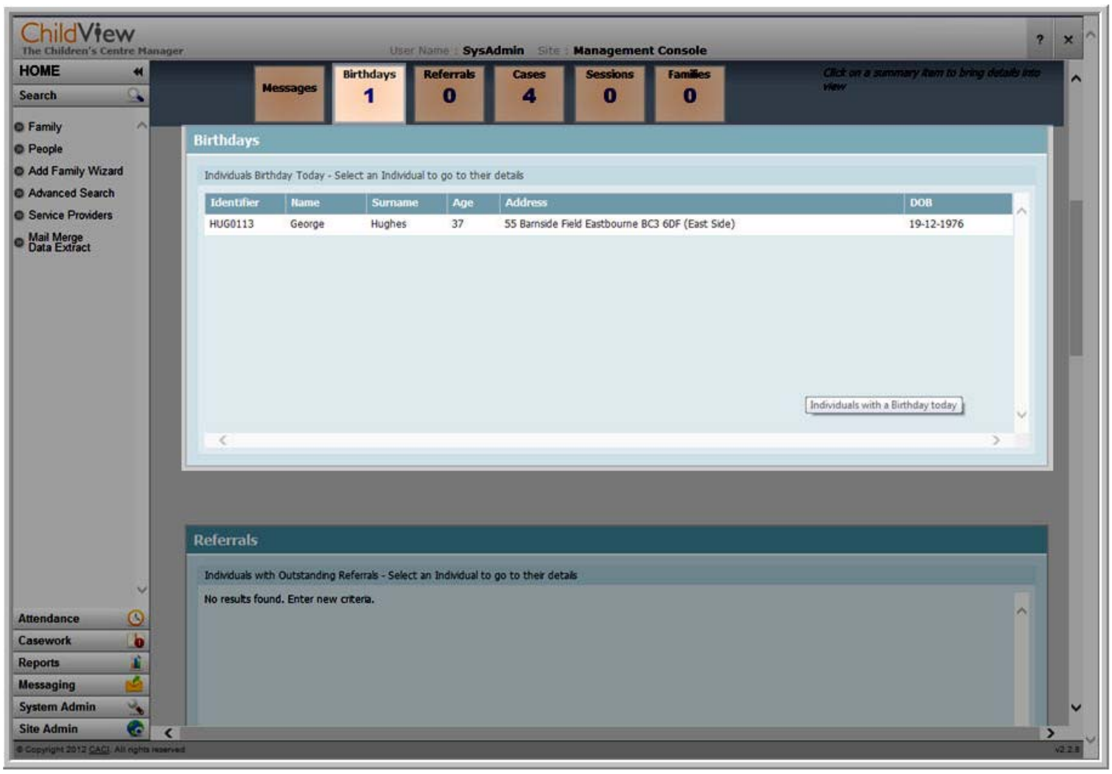
4.1. Messages

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

4.2. Birthdays

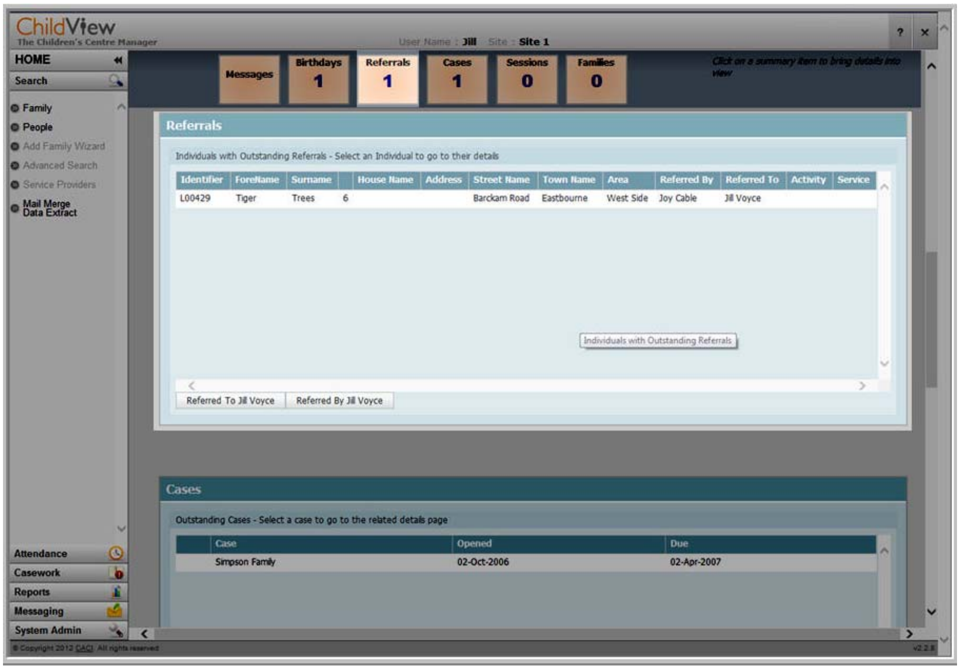
The birthdays section of the home page lists individuals whose birthday is today.

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



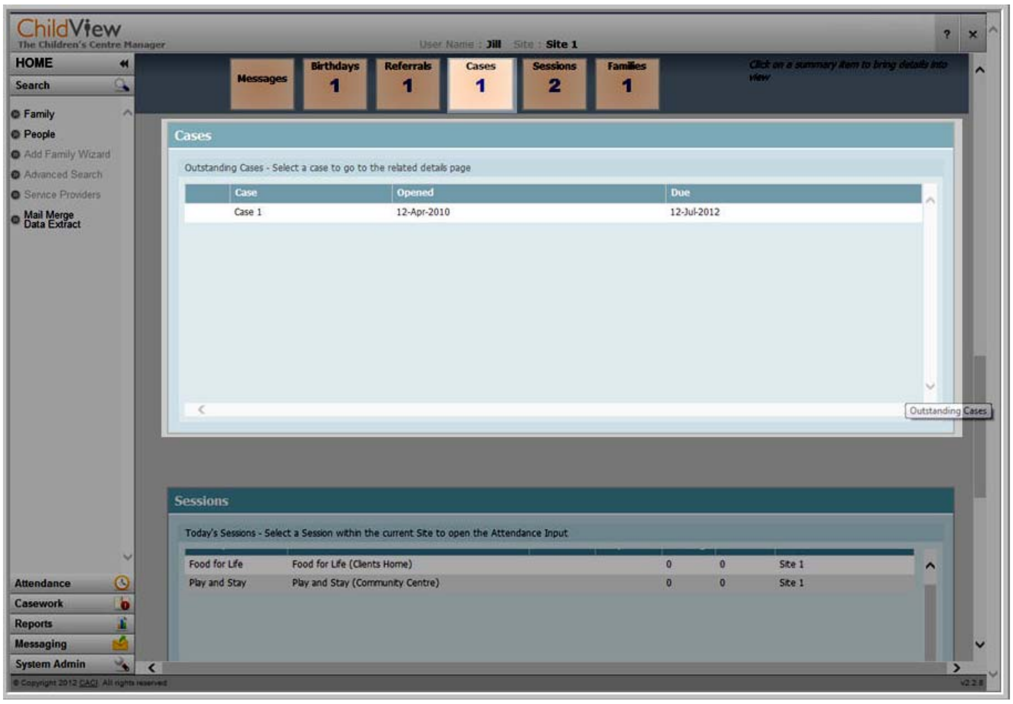
4.3. Referrals

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



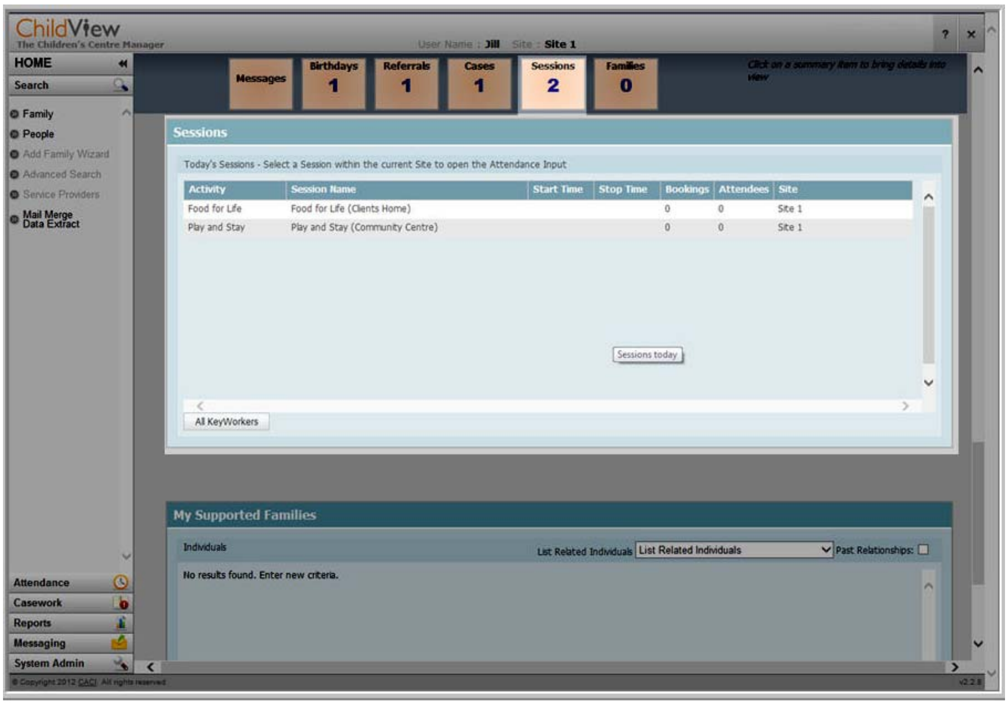
4.4. Cases

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.



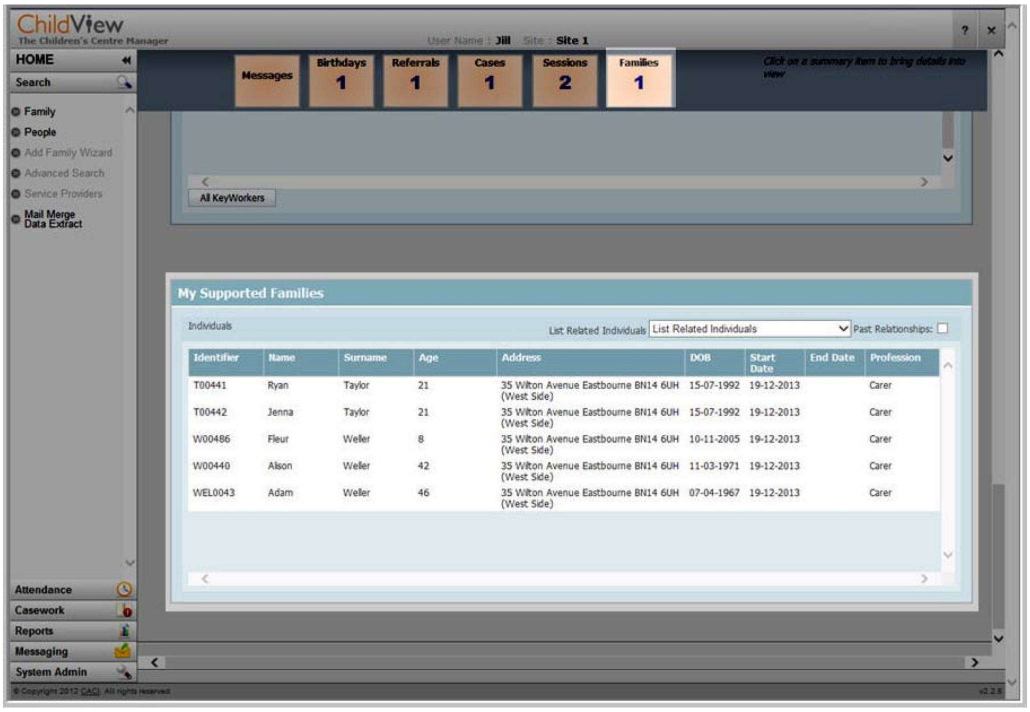
4.5. Sessions

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



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.



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 searched 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.

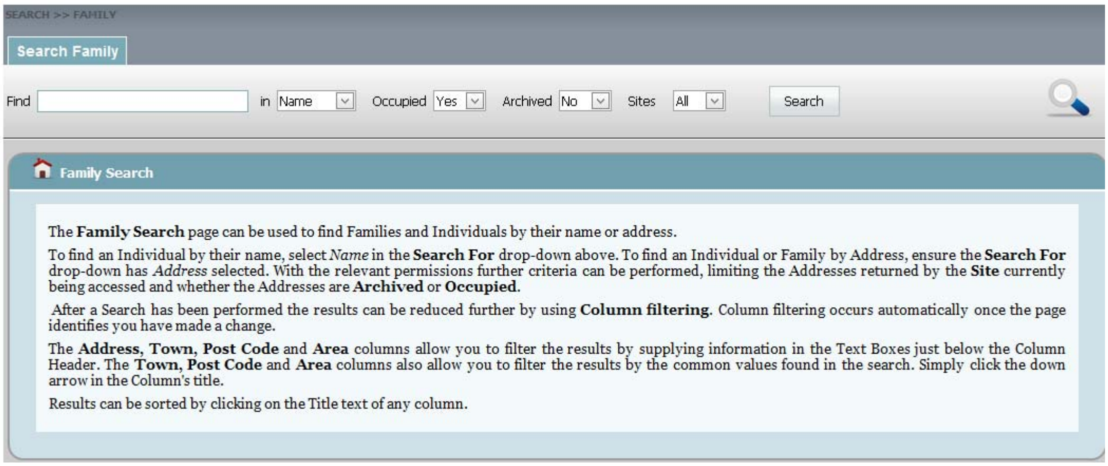
For day-to-day use of the database, it is likely to be the area that you use the most.

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

2. Family Search

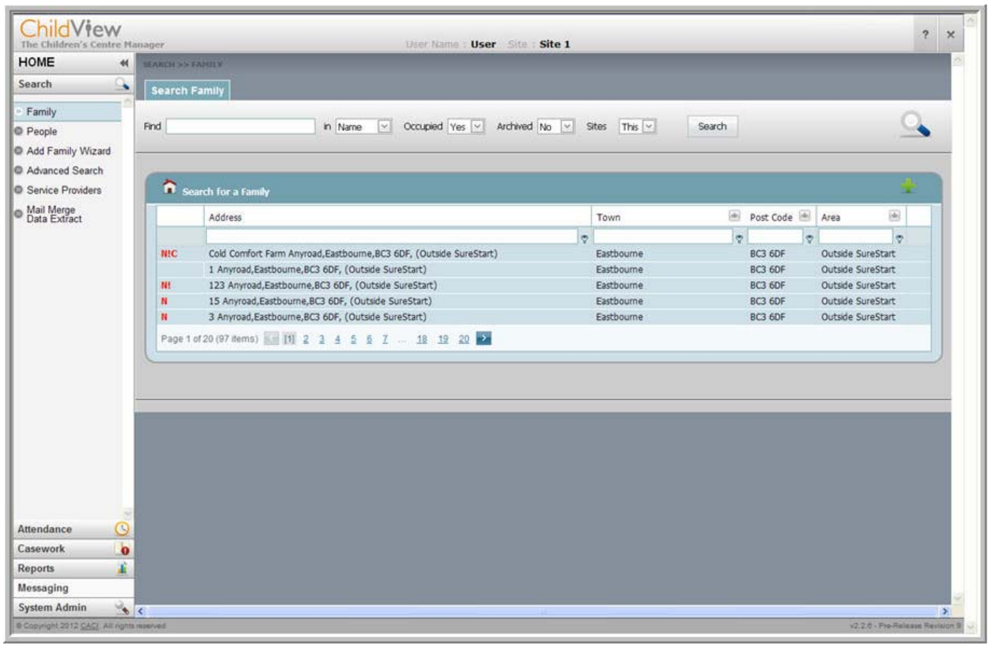
Selecting the family menu option allows you to undertake a search to return a list of addresses. You can then modify information about the selected address / view individuals as required.

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



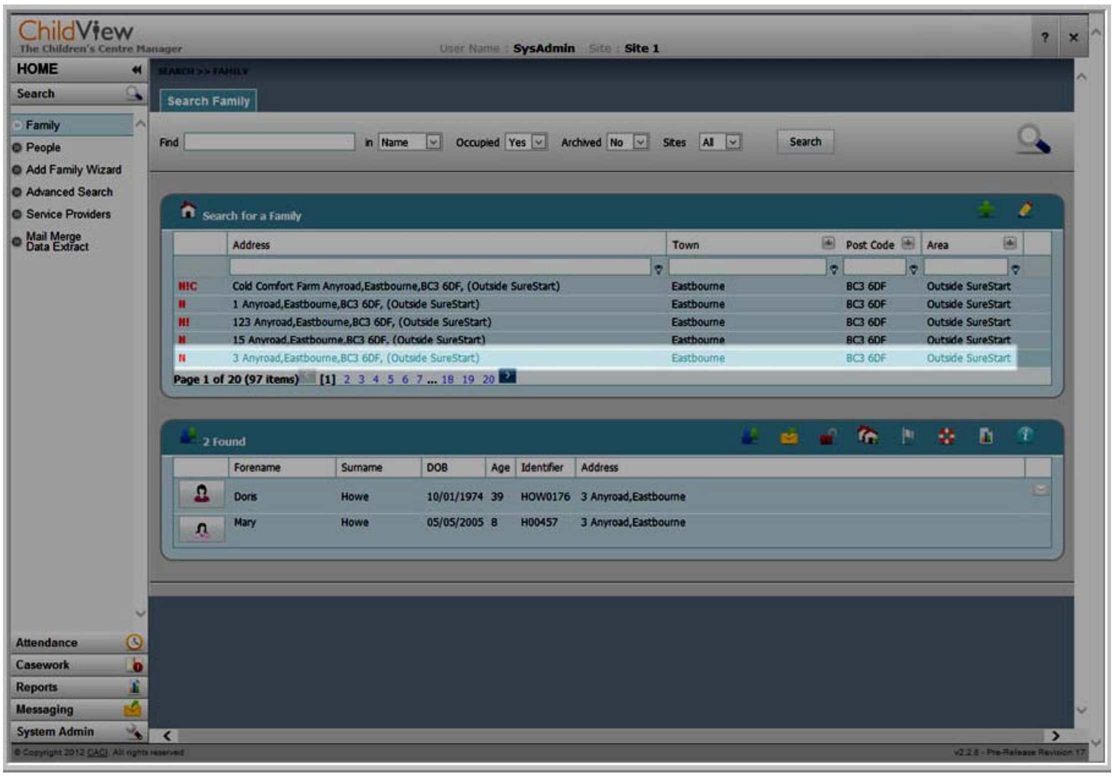
Remember: Always set the ‘occupied’, ‘archived’ and ‘sites’ drop-downs to ‘all’ so that archived individuals are returned in your search.

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:



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

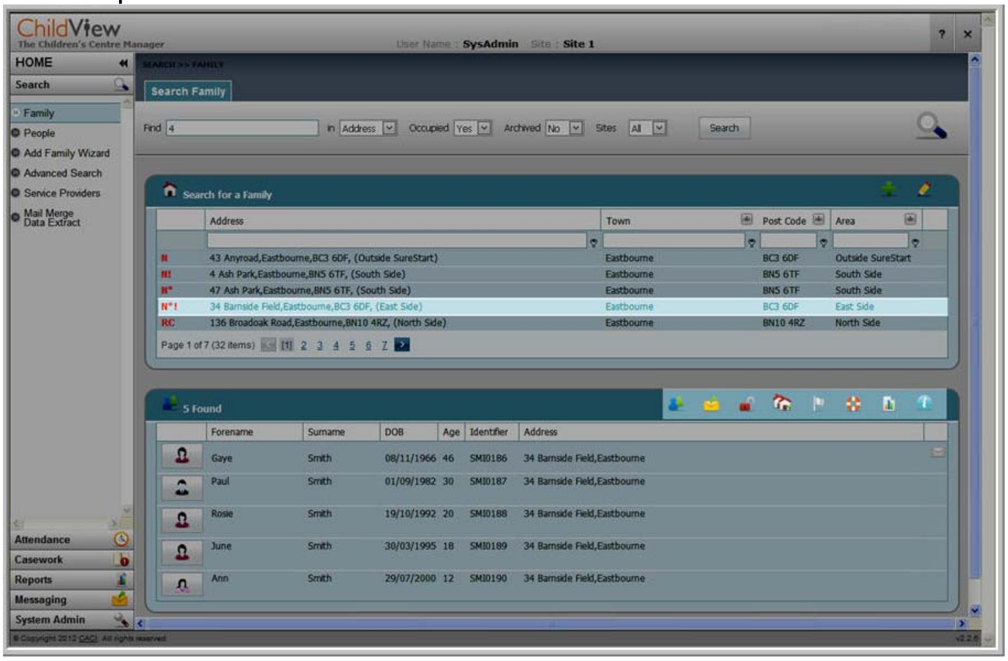
Clicking on one of the addresses will then show you a grid containing all the people who are registered to be living at that address:



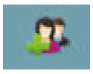
Clicking on one of the people icons to the left of the forename column will then launch that person's individual full details screen where you can view or edit their details as needed.

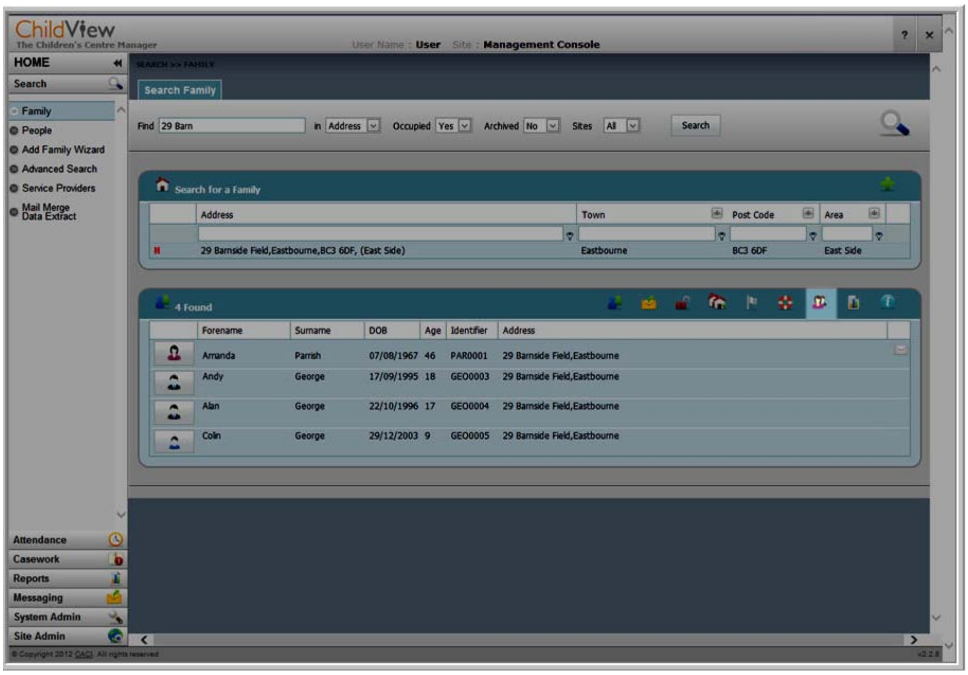
2.1 Address based operations

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:

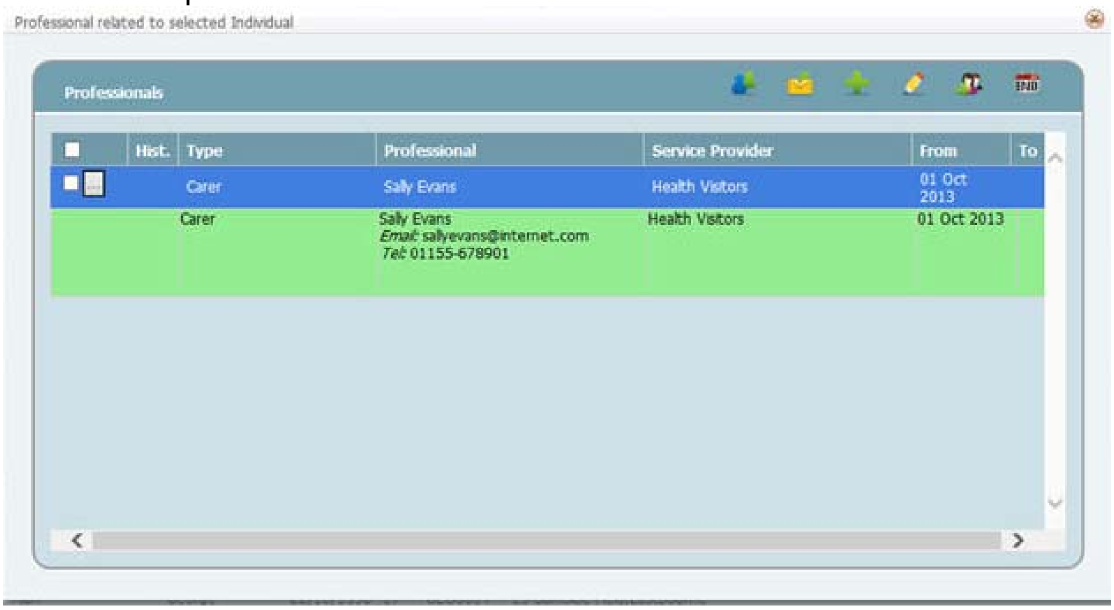


2.1.2. Maintain professionals involved

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.

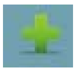


The 'Professional Related to selected Individual' window will list any existing professional relationships. Clicking the  icon will display more details for the selected professional.

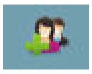


Professional relationships could include the following:

- 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

White - The relationship is current

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

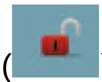
Grey - indicates historic information

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

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.

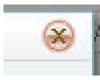
To archive a family, click on the open padlock icon () shown in the people grid. Note: Any archived addresses will have a red 'A' located to the right of the address details in the address search result grid.

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

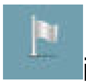
icon.

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.

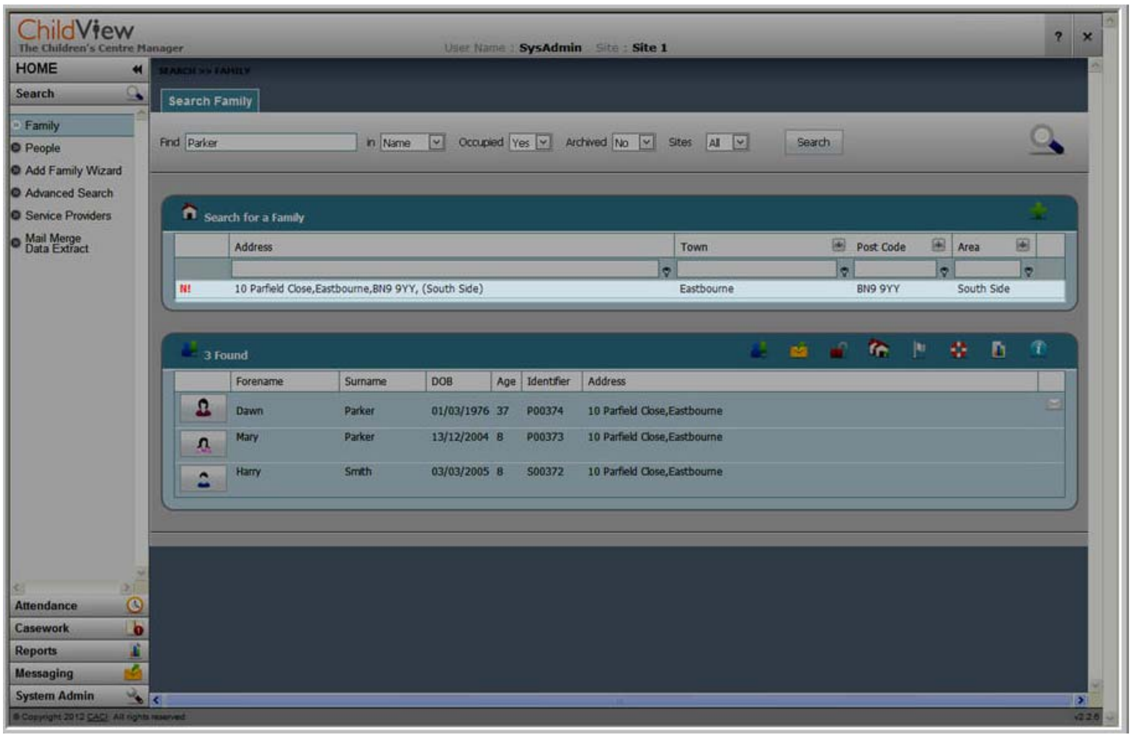
Please refer to Section 2: Search Menu, section 3 on moving a family address.

2.1.5. Family indicators

icon.

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

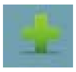
When you use the Family search screen any addresses returned that have an indicator will have a ! status indicator against them. For example:



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

AD: Aggressive dog

VP: Visit in pairs

DP: Dangerous/large pet

D: Deaf – unable to use voice telephone

OS: Family has received outreach services

*DA: History of drug/alcohol abuse in the home

V: History of violence

RTN: Refer to notes

TFR: Top floor residence, no lift

TR: Translator required

*PP: Parent/carer in custody

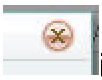
*DV: History of domestic violence

SF: Known to Safer Families

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.

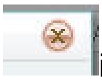
Click the icon at the top of the screen to return to the Family or People Search screen.

Modifying an existing Family Indicator

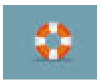
If you need to modify an existing Family Indicator click on the relevant row in the Family Indicators screen to highlight it. The edit icon will now be visible on the screen:

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.

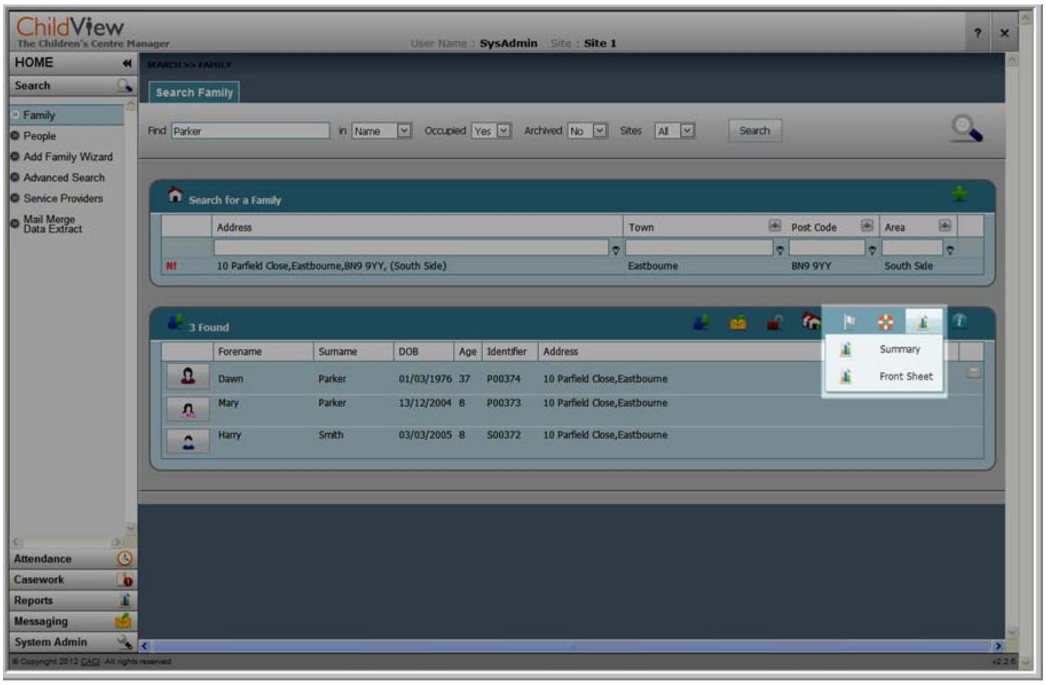
This function has now been superseded by professional involvements.

Please refer to section 3.1.1 Maintain professionals involved.

2.1.7. Family reports

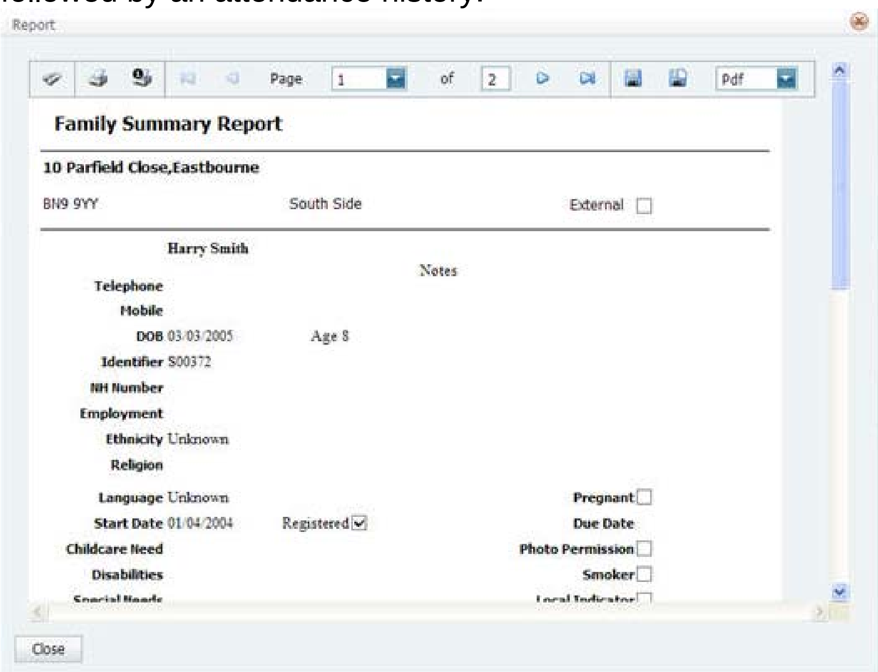
icon. New print

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



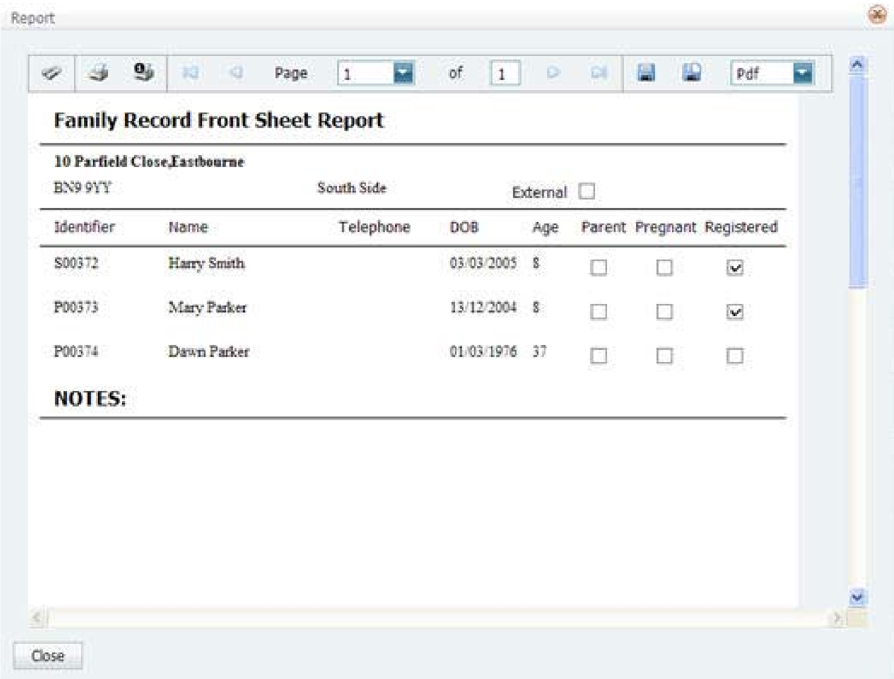
Summary report

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



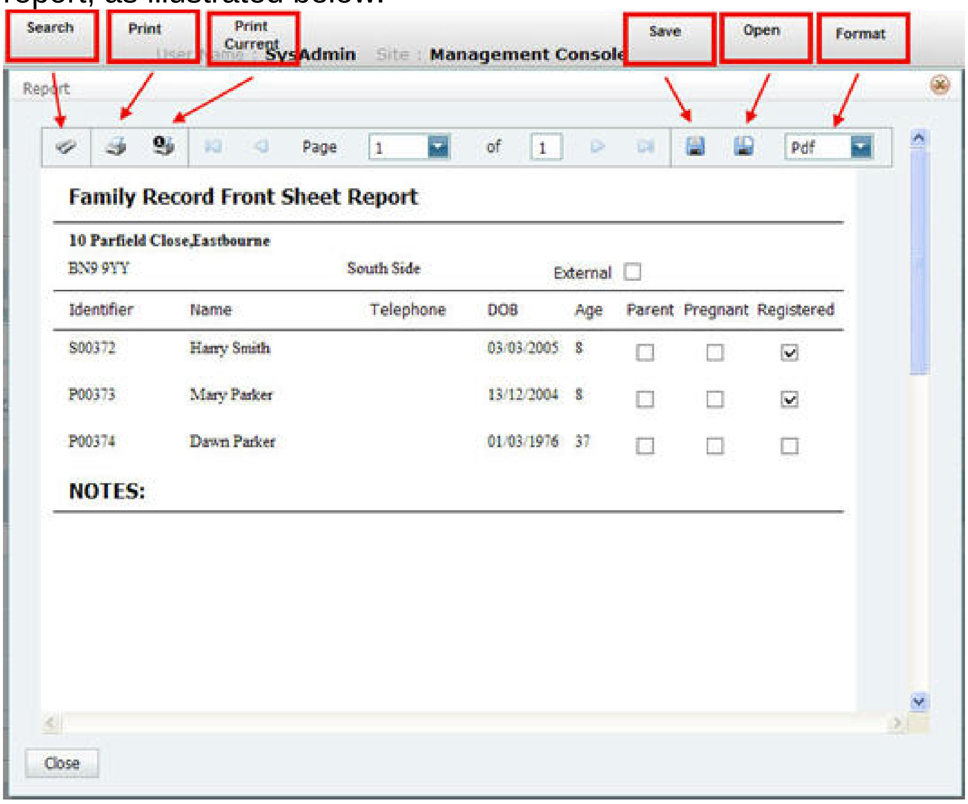
Front Sheet

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



Outputting reports

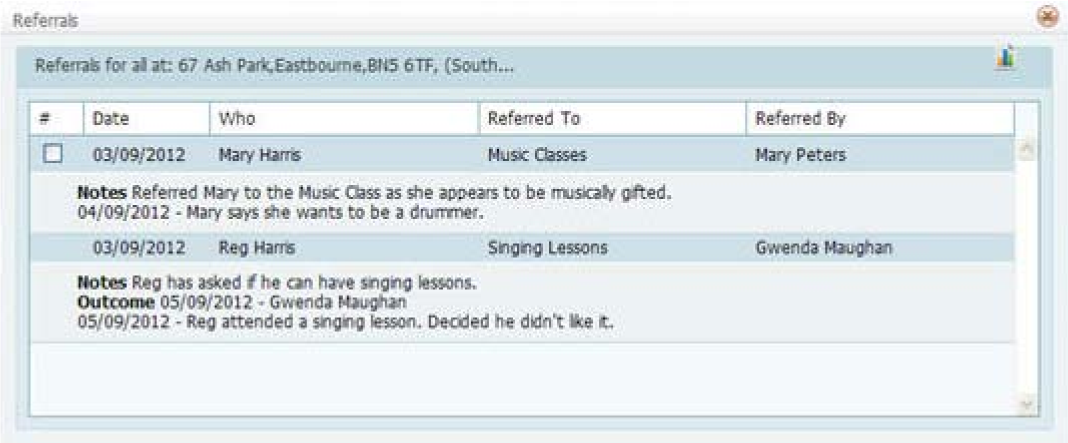
There are various output options available which enable you to save or print a report, as illustrated below.



2.1.8. Family referrals

icon.

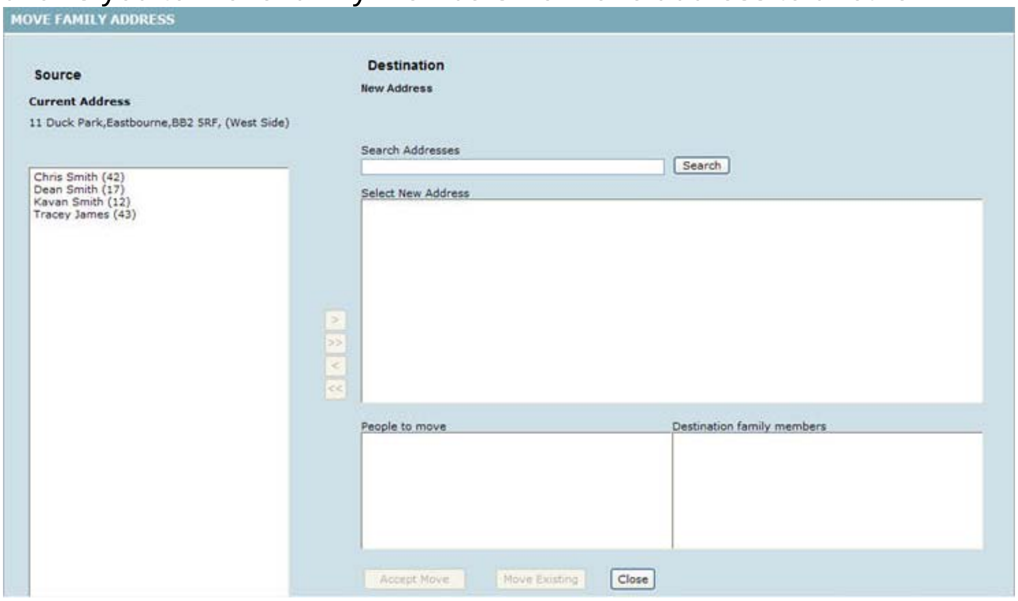
Click on this icon to see a list of referral cases in respect of all individuals registered to the selected address.



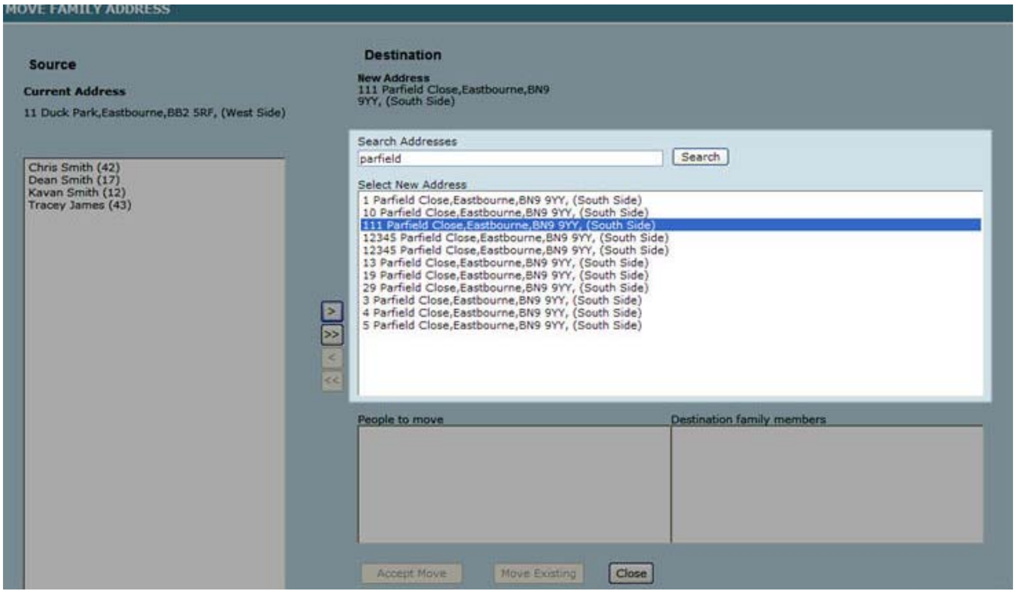
From the Referrals screen, you can edit referrals or allocate outcomes in respect of them. For more information about referrals, please see section xx adding referrals.

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.



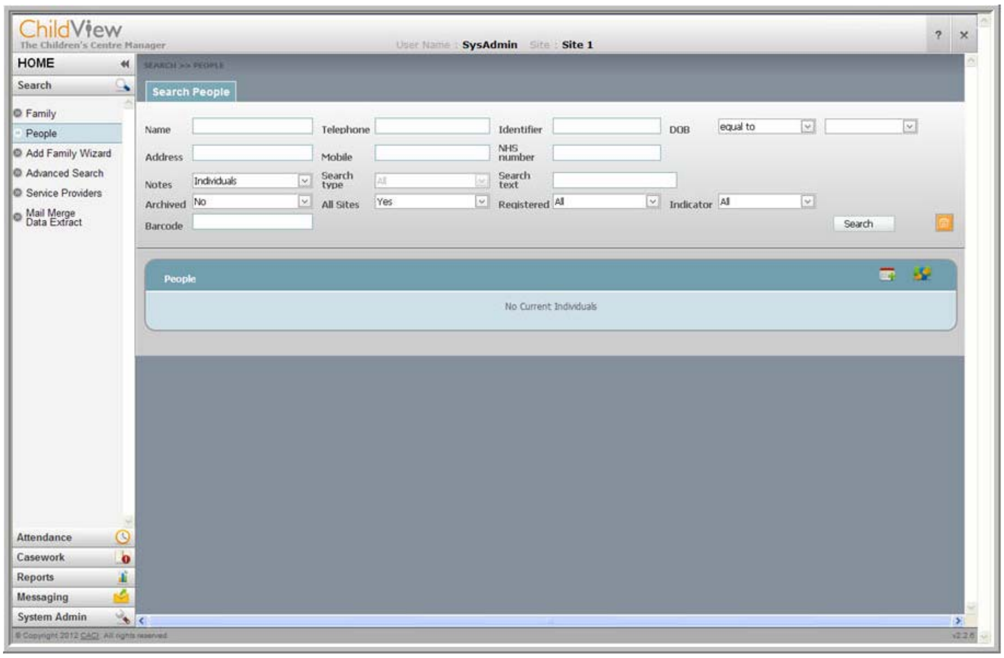
5. The Family who are moving will be listed under their current address on the left-hand side of the move family address screen. If all the

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.

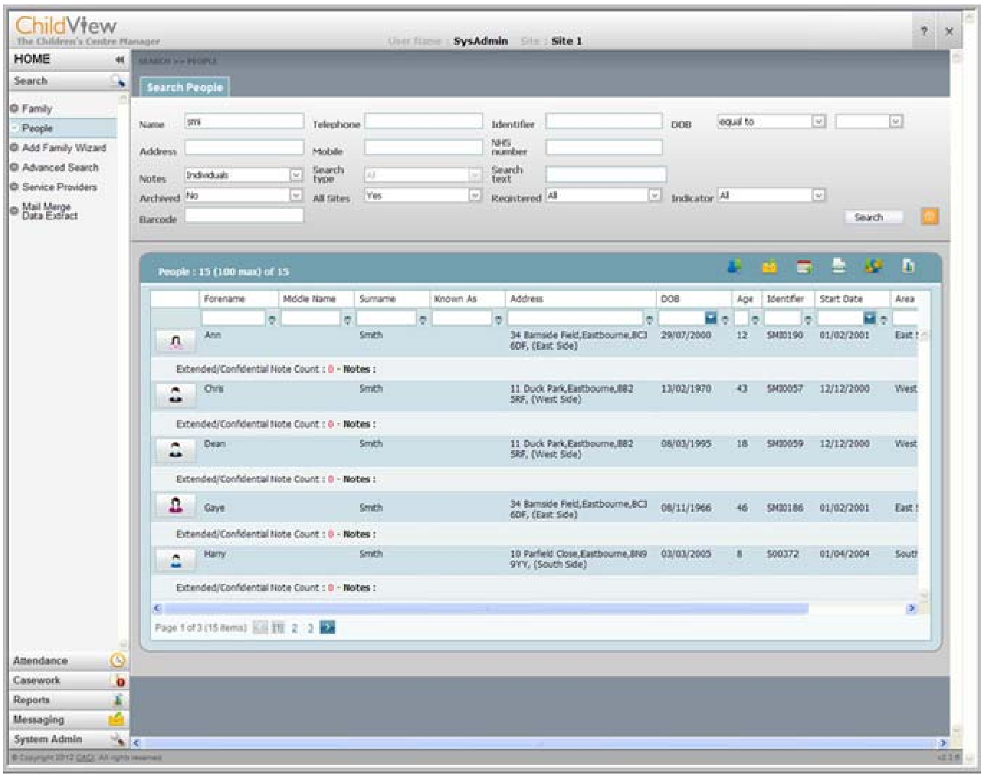
6. Once you have moved the appropriate names into the People to move box, click the 'Accept Move' button.

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:

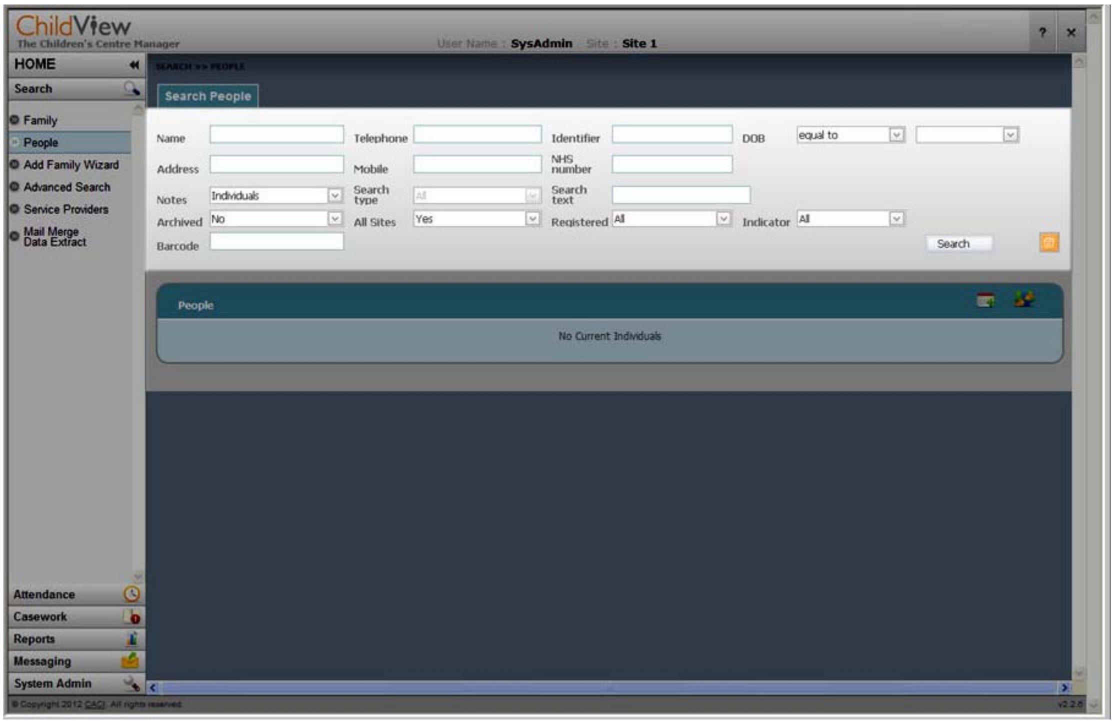


To quickly see a list of names, click in the name field, type part of the name you are looking for, then click the 'search' button. Your list of results will appear in the main part of the screen, similar to this:

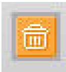


1.1. Searching options

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



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.

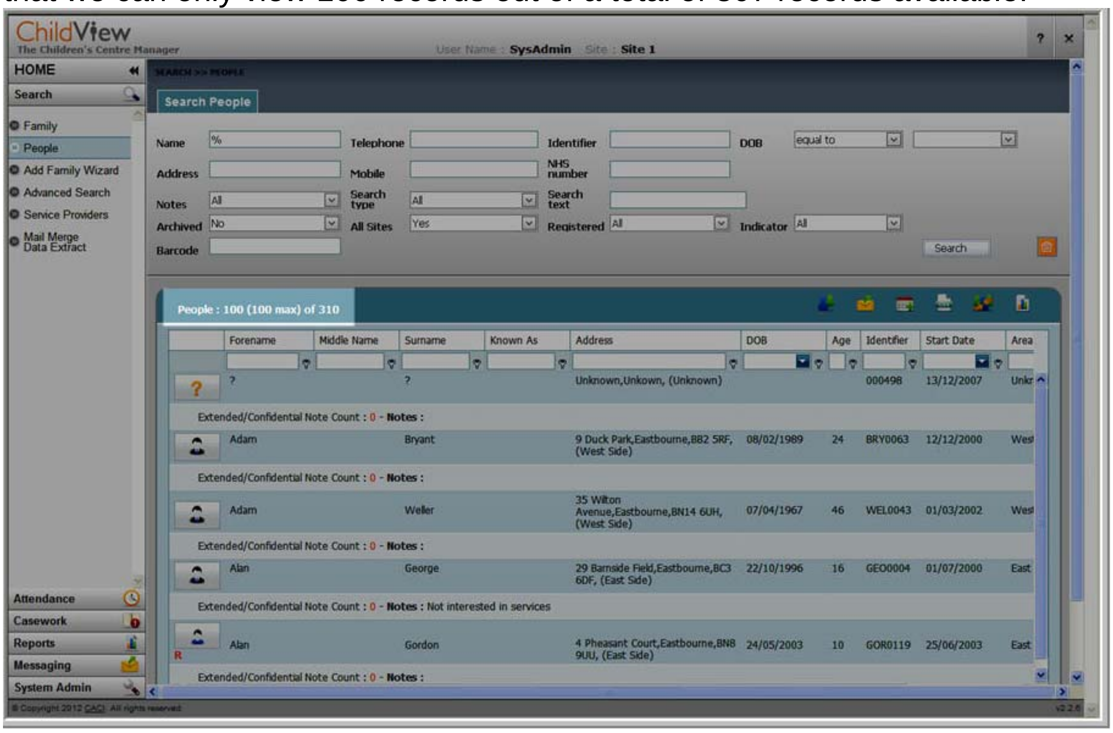
Search button

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

1.1. Returned individuals

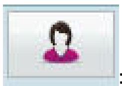
The search results are limited to 100 records when displayed on the screen and if this happens you may need to be more specific with your search criteria.

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:

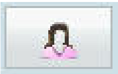


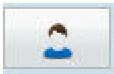
1.1.4 Individual icons

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.

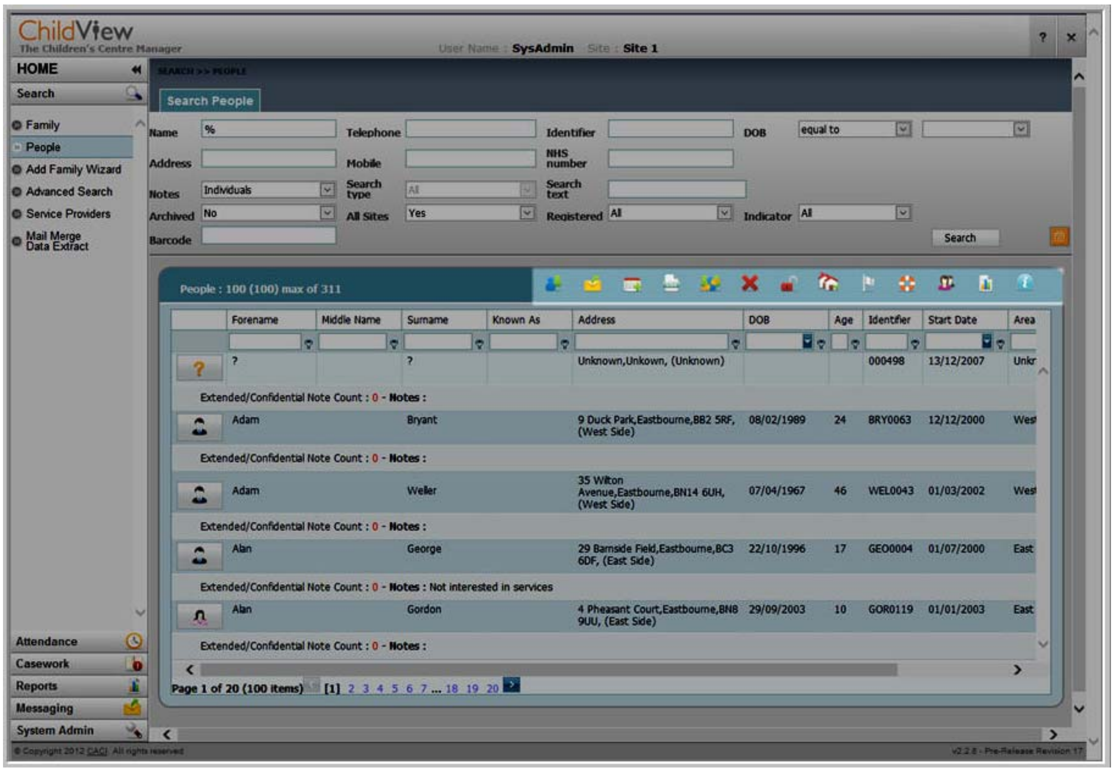
1.1.4. Status Indicators

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.

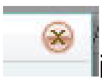


Note: The individual selections made are only relevant to the page of results that are currently being viewed. Any selection made on other pages will have been lost when you navigated away from that screen.

1.1.4 Field chooser

icon.

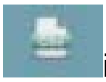
Clicking the' Field Chooser' icon opens a box showing the additional fields that can be viewed in the search results:

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.

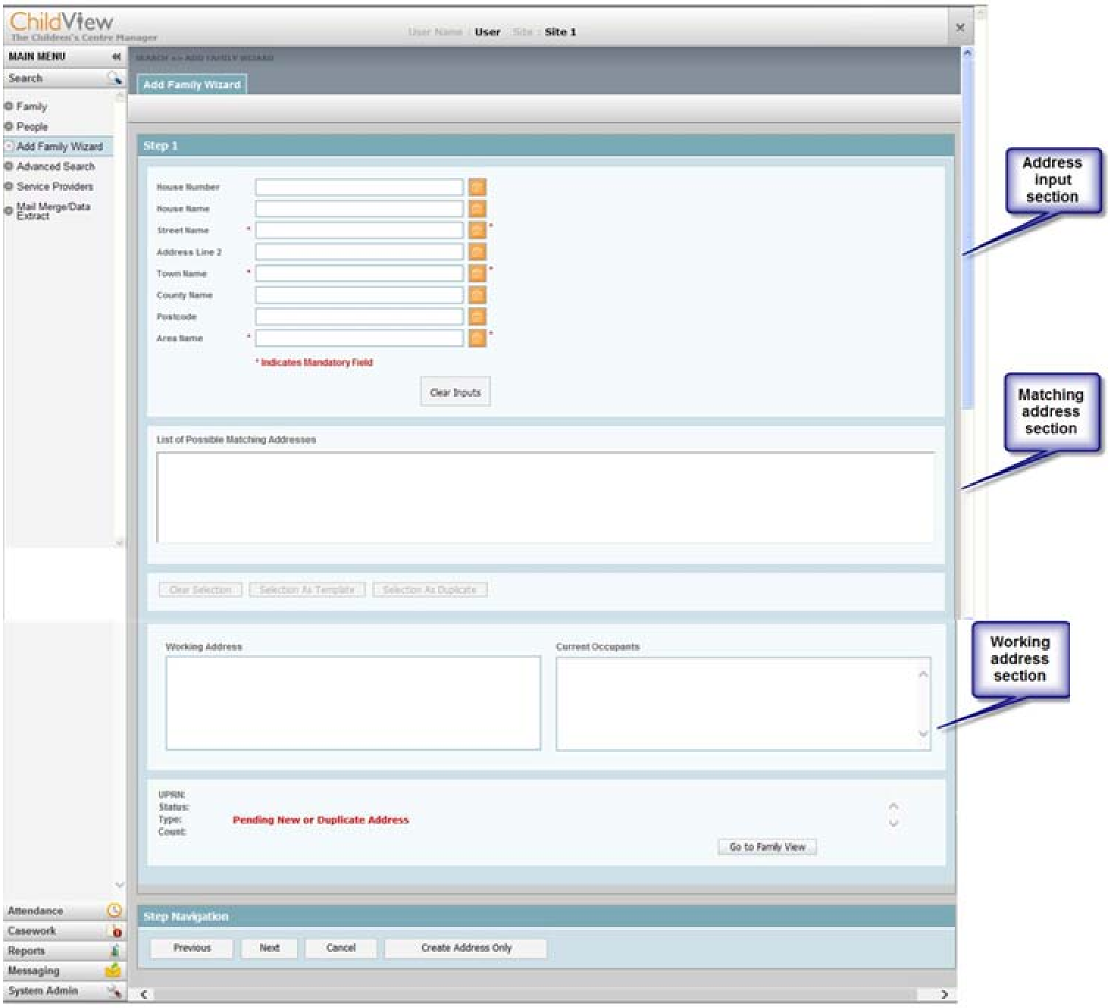
1. Add Family Wizard

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



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.

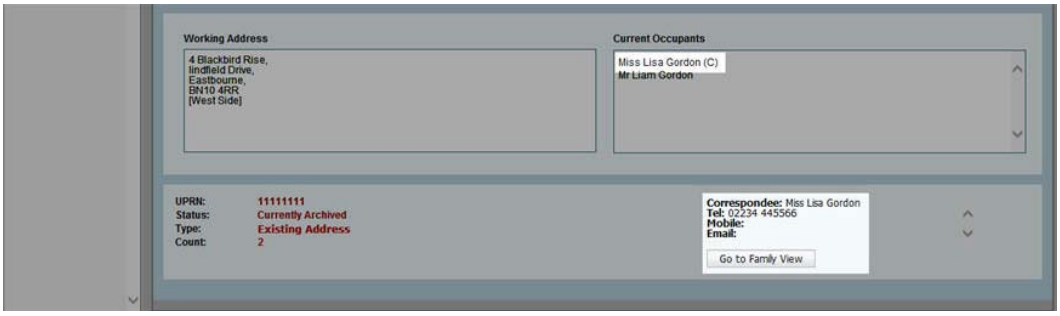
When an address has been selected in the possible matching addresses list, the user will be working with an existing address and the details of the existing address will be displayed in the working address pane.

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.

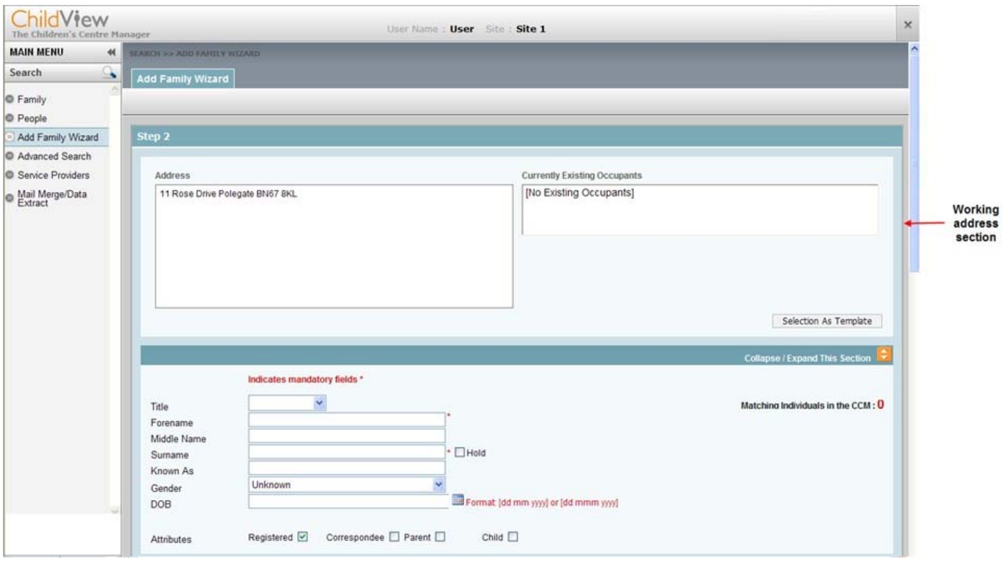
5.4. Add family members

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.

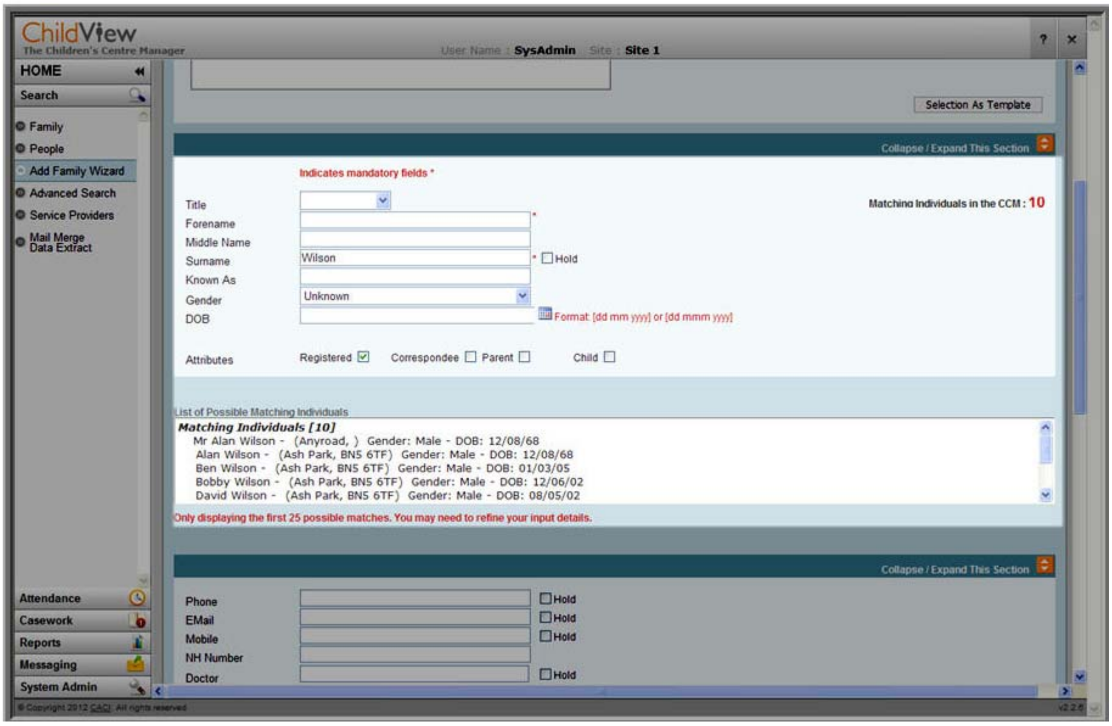
If you do not want a family included in a mailing list, then simply ensure that nobody in the family has the ‘Main Correspondee for the family?’ indicator ticked.

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:



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.

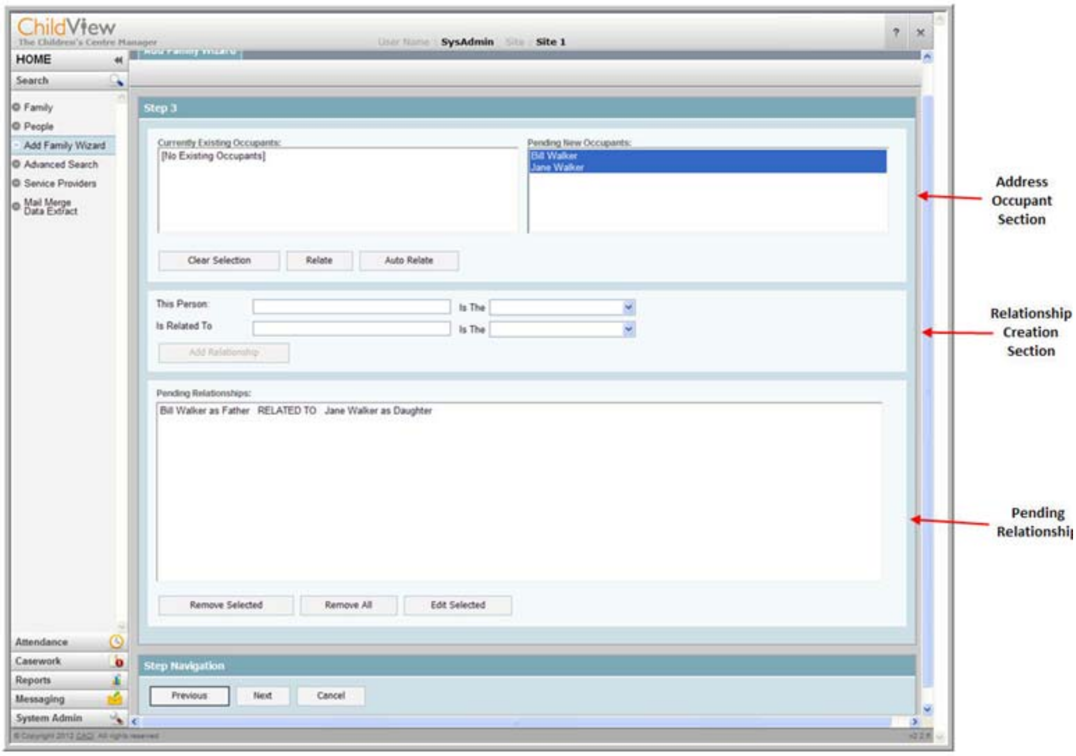
You can edit the details of a pending new member by selecting the member from the list and clicking the ‘Edit Selected’ button. The details of the selected member will be imported back into the member input section for editing. When editing a pending member, the buttons in the member input section will 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:

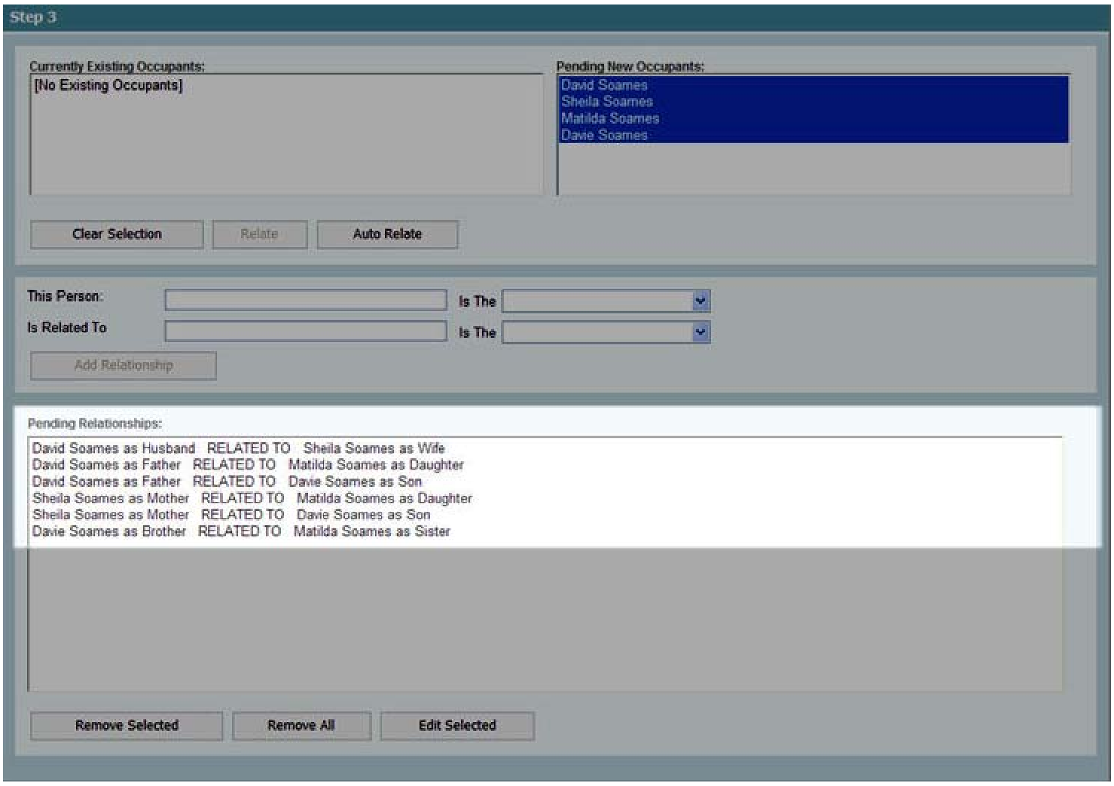
‘First’ Generation Relationships	Husband – Wife
	Father – Son
	Father – daughter
	Mother – Son
	Mother – Daughter

‘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.



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.

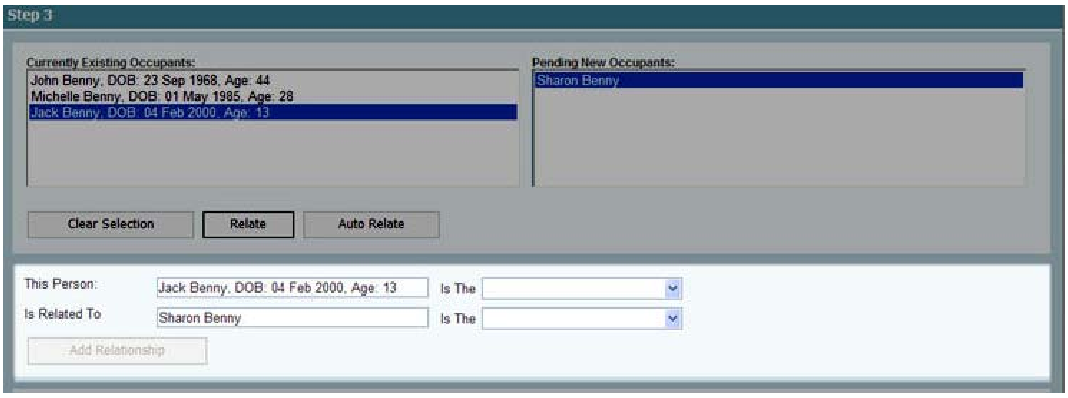
You can edit the details of a pending new relationship by selecting the relationship from the list and clicking the 'Edit Selected' button. The details of the selected relationship will be imported back into the relationship creation section for editing. Make the necessary changes to the member and click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

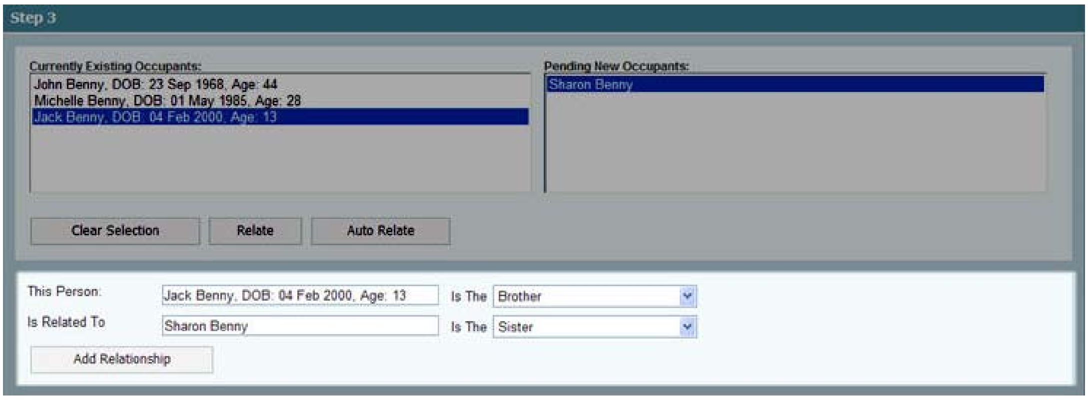
Clicking this button will cause the names of the two occupants to appear in the text boxes.



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.



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

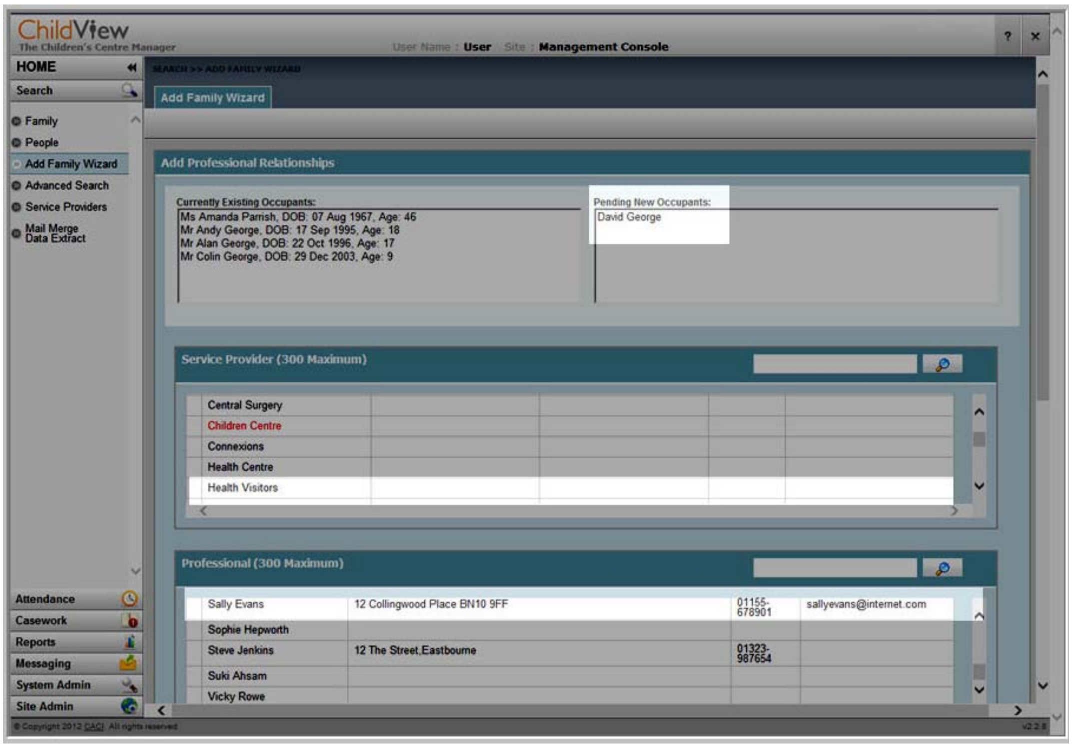
Using the same process, continue to create and add new relationships for each occupant pairing as required.

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

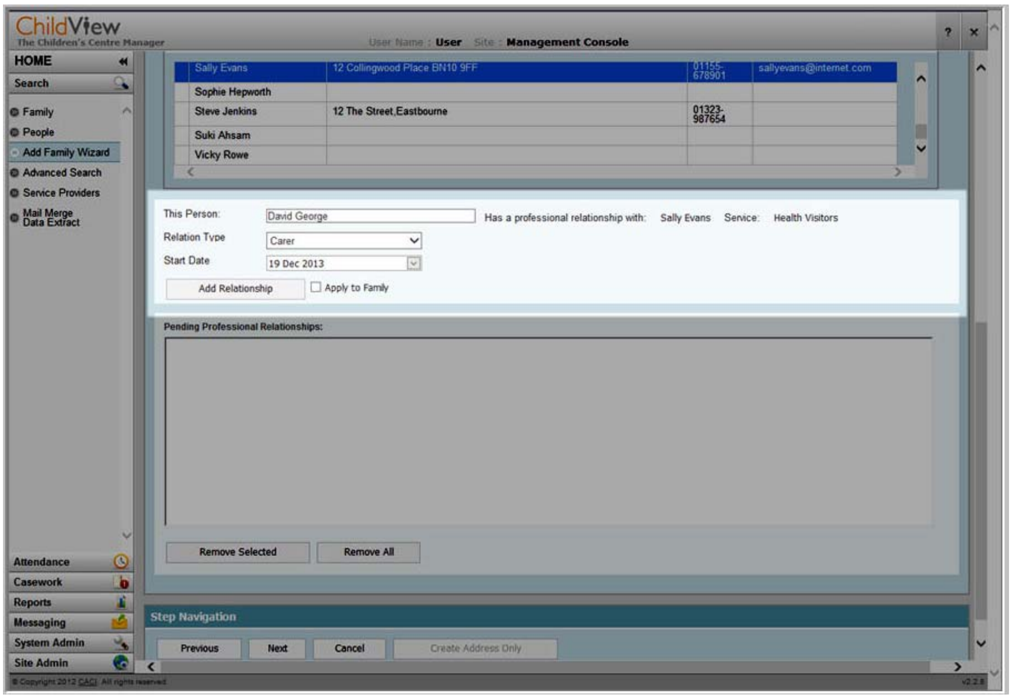
Once all the relationships have been created, click the ‘Next’ button to move to the Pending Additions Summary page where you can review the details added previously.

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.

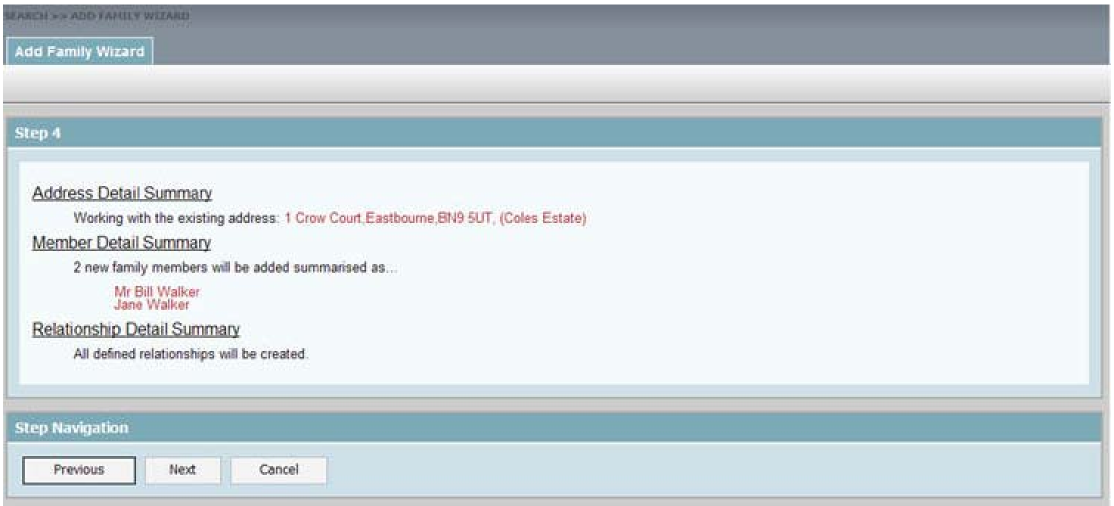


Professional relationships can be added and removed in the same way as in Family Relationships.



5.7. Pending additions summary and confirmation

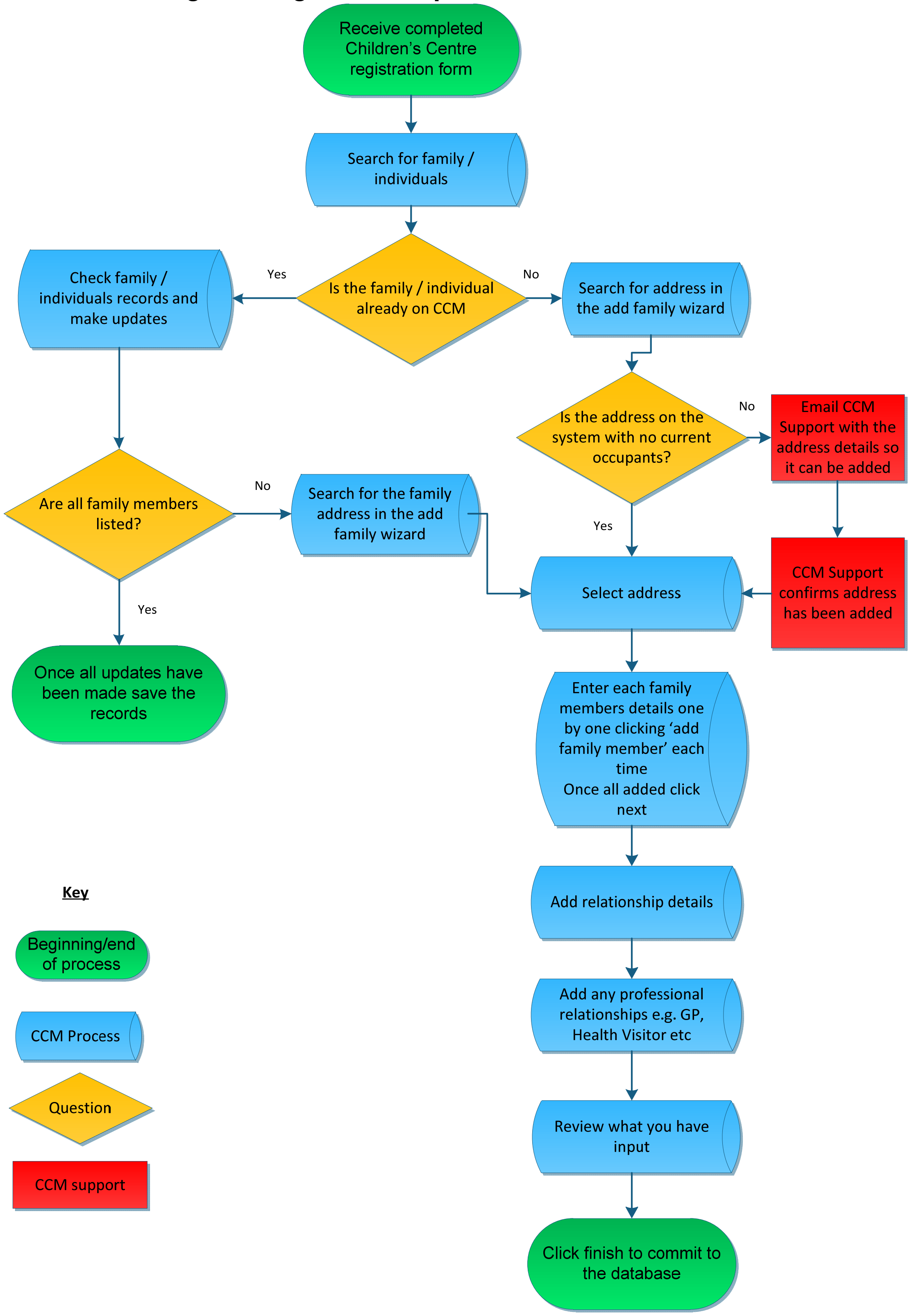
A summary of information you have entered for your review. You can also go back to alter data if required.



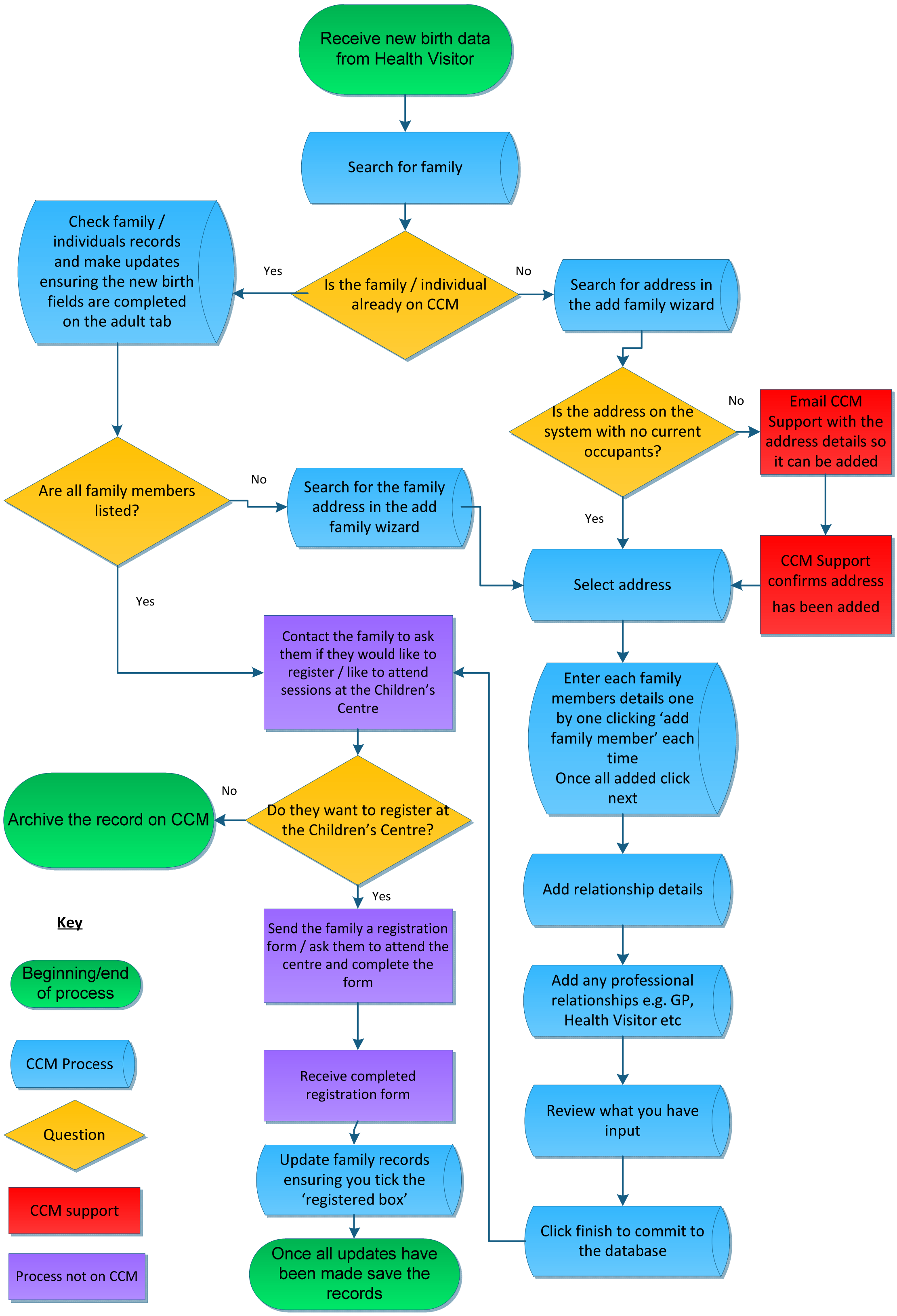
Click next.

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).

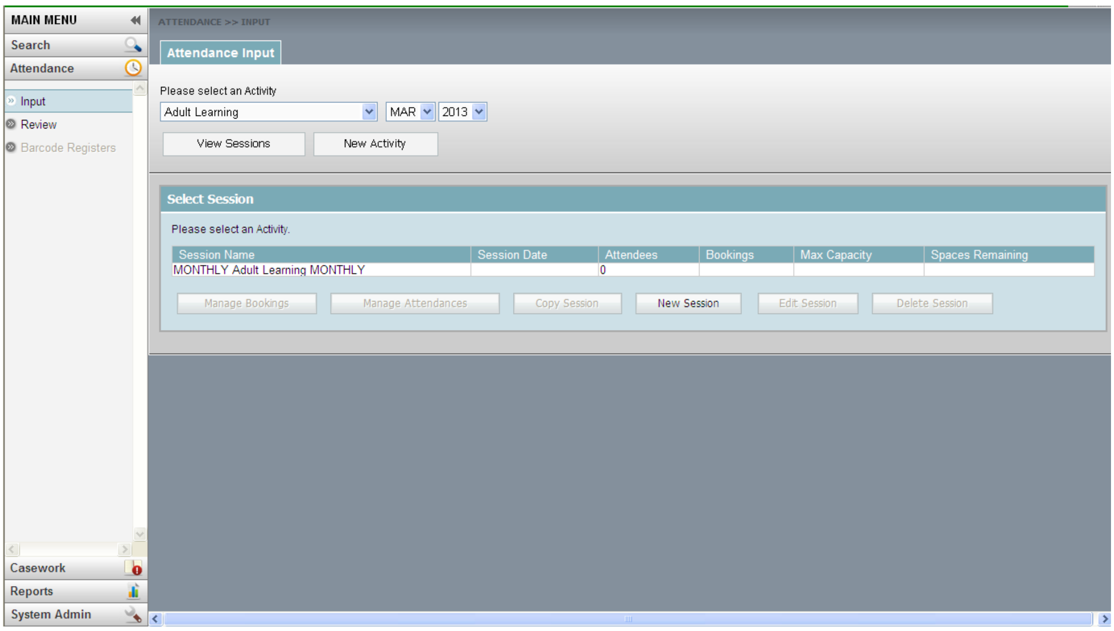
It also provides you with a very flexible and powerful tool for reviewing and analysing the overall attendance at those activities, through the review option.

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:



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	• Manicure & Pedicure • Complimentary Health • First Aid • Health & Safety • IT courses • Parenting Courses • Adult Numeracy/Literacy • Parent Volunteering • ESOL	• Tier 1 • ESOL • Adult learning • (ESOL is a targeted course, and would need to be recorded as a Tier 2)	• Healthy living
Baby Groups	Any activities focussed on babies under 1 year old	• Breastfeeding sessions • Baby Massage • Baby Yoga • Baby weaning • Baby Play/Group • Baby Makaton • Baby Rhyme Time	• Tier 1 • Baby weighing • Breastfeeding support • Immunisations • Transitions to solids	• Child development • Healthy living • Physical development
Child Health Services	Events aimed at the health and wellbeing of children 0-5 years	• Health visitor appointments • Baby clinic • Immunisations • Development checks • Healthy start vitamins	• Tier 1 • Transitions to solids • Healthy eating • Baby weighing • Immunisations • Oral health • Breastfeeding support	• 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	• Childminder Drop-in	• Tier 1	• Creativity • Holistic play
Community Support Outreach	Activities in the community aimed at promoting the Children's Centre that are run at other community venues This does not include all sessions run at linked venues i.e. stay and play etc	• Schools fetes • Community festivals/events • School open evenings • Information stalls	• Tier 1	• Knowing your community
Crèche	Occasional childcare for children during particular events such as parenting programmes.	• Crèche	• Tier 1	
Domestic Violence	Specialist service designed to support vulnerable families.	• DV Safer Families • DV Stay & Play • DV Parenting • DV Counselling	• Tier 3	• Parenting support • Building confidence
Economic Wellbeing	Activities and advice from specialist and/or CC that assist families in achieving economic wellbeing.	• Citizen's Advice • Welfare Rights Advice & Information • Employability courses • Housing Support Advice & Information • REED	• Tier 1 • Access to benefits / training / employment / legal advice / volunteering opportunities / housing support	• 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.	• 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	• Tier 1	• Child development • Language development
Extended Services	Activities held for children outside of school hours.	• Breakfast Clubs • After school clubs • Holiday schemes	• Tier 1	• Social development • Physical development • Creativity • Holistic play
Family Support Outreach	Aimed at families referred/self-referred, potentially at risk requiring additional family support.	• CAFS (reviews/meetings) • Outreach phone calls and correspondence • Outreach in centre • Outreach out of centre	• Tier 2 • Any other relevant target can be added depending on what is covered in the session	• 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	• Home visits	• Tier 2 • Any other relevant target can be added depending on what is covered in the session	• Any appropriate aims
Health & Safety	Events focussed at promoting family health or safety either as an individual or in the home.	• Healthy cooking • Fire safety • Home safety	• Tier 1 • Transitions to solids • Healthy eating • Oral health • Immunisations • Smoking cessation • Baby weighing	• Healthy living • Safety in the home
Male Carers Groups	Sessions aimed at male carers.	• Fathers groups • U8's football	• Tier 2	• Parenting support
Maternity Services	Events aimed at new or expectant parents.	• Ante Natal Classes • Post natal classes • Unity	• 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.	• Fundraising events • Day trips • Educational visits • Fun-days	• 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.	• Strengthening families • Triple P • Incredible Years • Solihull • Family Links	• Tier 2	• 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.	• Child sleep workshops • Toilet training workshops • Behaviour advice workshops	• Tier 1 • Adult learning	• Parenting support • Child sleep support • Toilet training support • Behaviour support
Parents Groups	Sessions for parents where their children are not present.	• Parent support groups • Parents forums • Coffee mornings • Advisory Boards	• Tier 2	• 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.	• Breastfeeding advice • Telephone surveys • Follow-up phone calls e.g. new birth or requesting additional information against registration data	• Tier 1 / Tier 2 • Breastfeeding support	• 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)	• Open Doors • Mencap • Rainbow Trust • Parents of Down Syndrome Group • Any SEN support group • Speech and Language (1:1)	• Tier 3	• Building confidence • Social development • Emotional development • Language development
Stay and Play	Events for all families focussed on play and development	• Stay & Play • Messy Play • Creative Play • Parent & Toddler Group • Music Groups	• Tier 1	• Creativity • Holistic play • Physical development • Social development
Young Parent Groups	Sessions aimed at young and teenage parents (aged 13-24 years)	• Arts Depot Activity Run Events • Teenage mother groups	• Tier 2 • (any other relevant target can be added depending on what is covered in the session)	• Parenting support

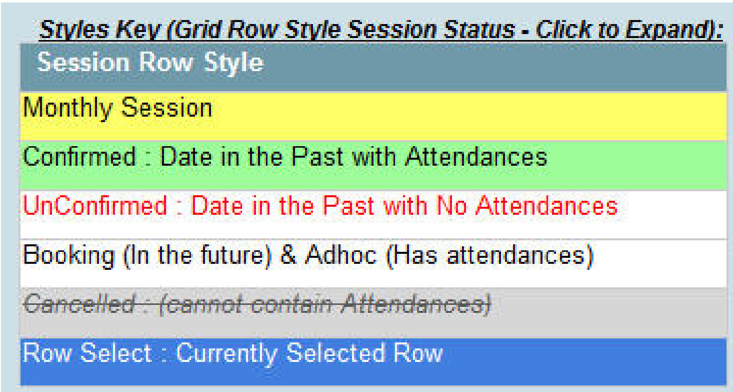
1.3. Creating a new session

1. To create a session the Activity type must already be set up in the system.

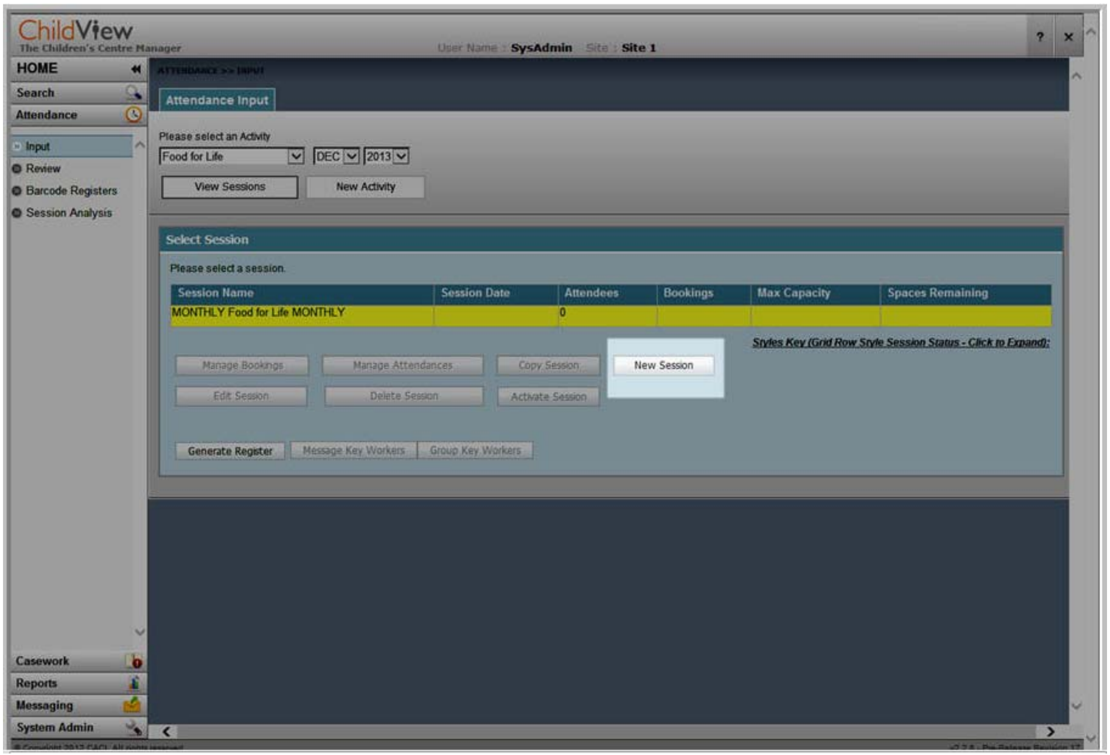
2. From the Side Menu, click the Attendance button, then click the Input option.

3. Select the appropriate entry in the drop down activity list.

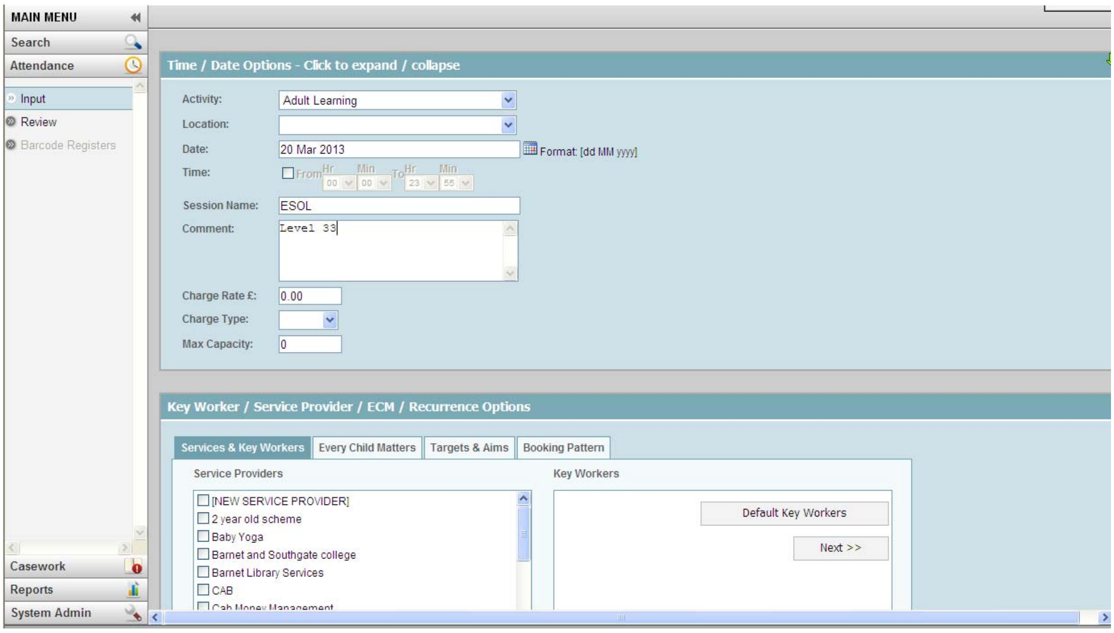
4. Press the 'View Session' button. Any existing sessions are listed and colour coded. A key can be displayed by clicking on 'Styles Key (Grid Row Style Session Status - Click to Expand):'



5. Click the 'New Session' button:



You will then be presented with the following screen:



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.

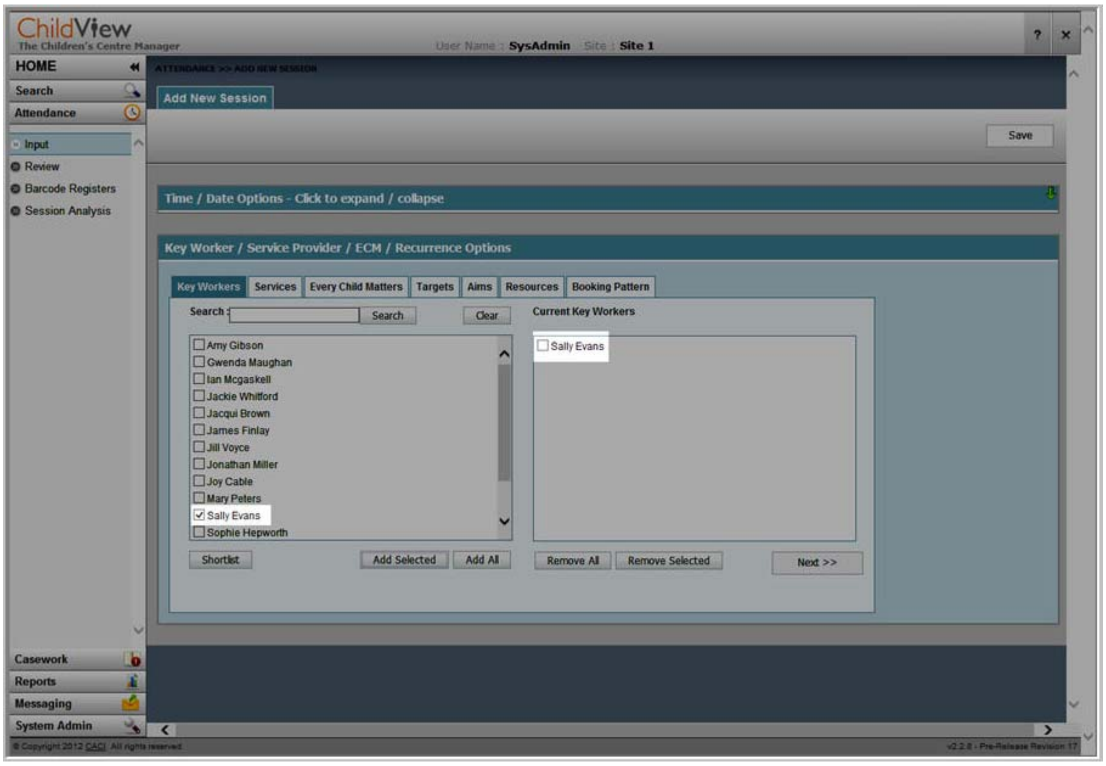
To add items to the session, tick one or more in the left hand pane and click the 'Add Selected' button. The 'Add All' button will add all items irrespective of whether or not they are ticked.

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

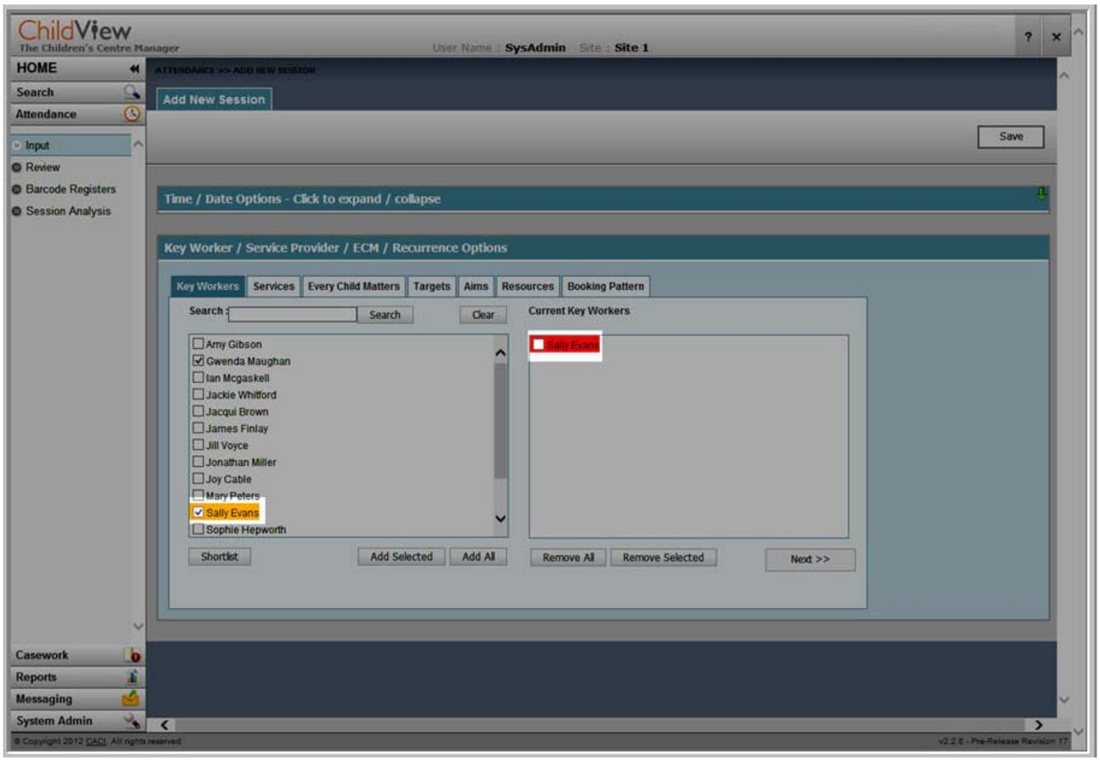
The default targets for the activity will be copied to a new session. You should always review these and update where appropriate.

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*	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. By recording this you are able to run reports to show how many sessions have been run in conjunction with specific service providers. **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.
Key Workers*	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. **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.
Every Child Matters Outcome	Pre-set but can be amended for a session as required.

Targets *	Targets are the 3 tiers of services, pre-set to activities but can be amended for each session. There are additional targets (please refer to the targets and aims section below); that must be selected for sessions with this focus.
Aims	Aims are similar to targets, and are used to record outcomes of sessions (please refer to the targets and aims section below).
Booking Pattern	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).

*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

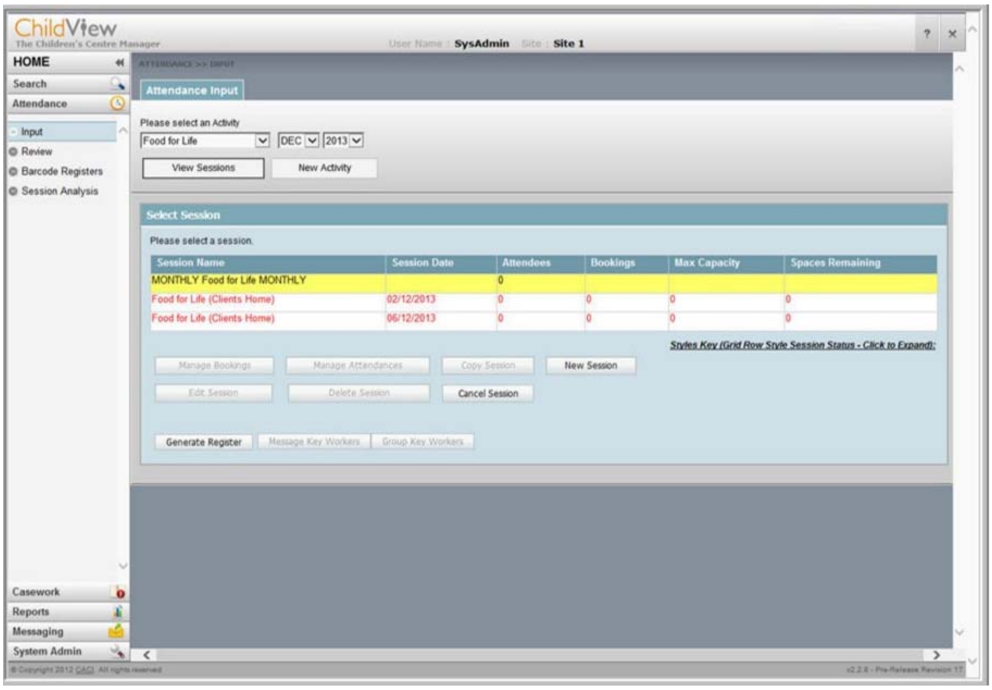
Aims that can be assigned to sessions

- 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

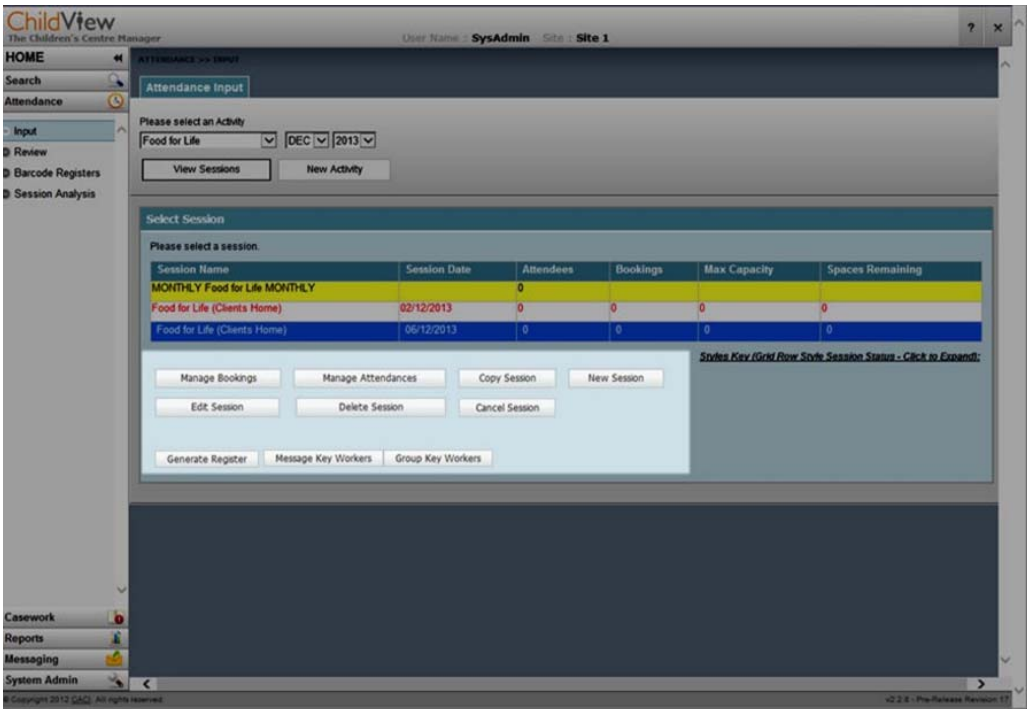
1.4. Manage attendances

1. From the Side Menu, click the Attendance menu, then click the Input option.

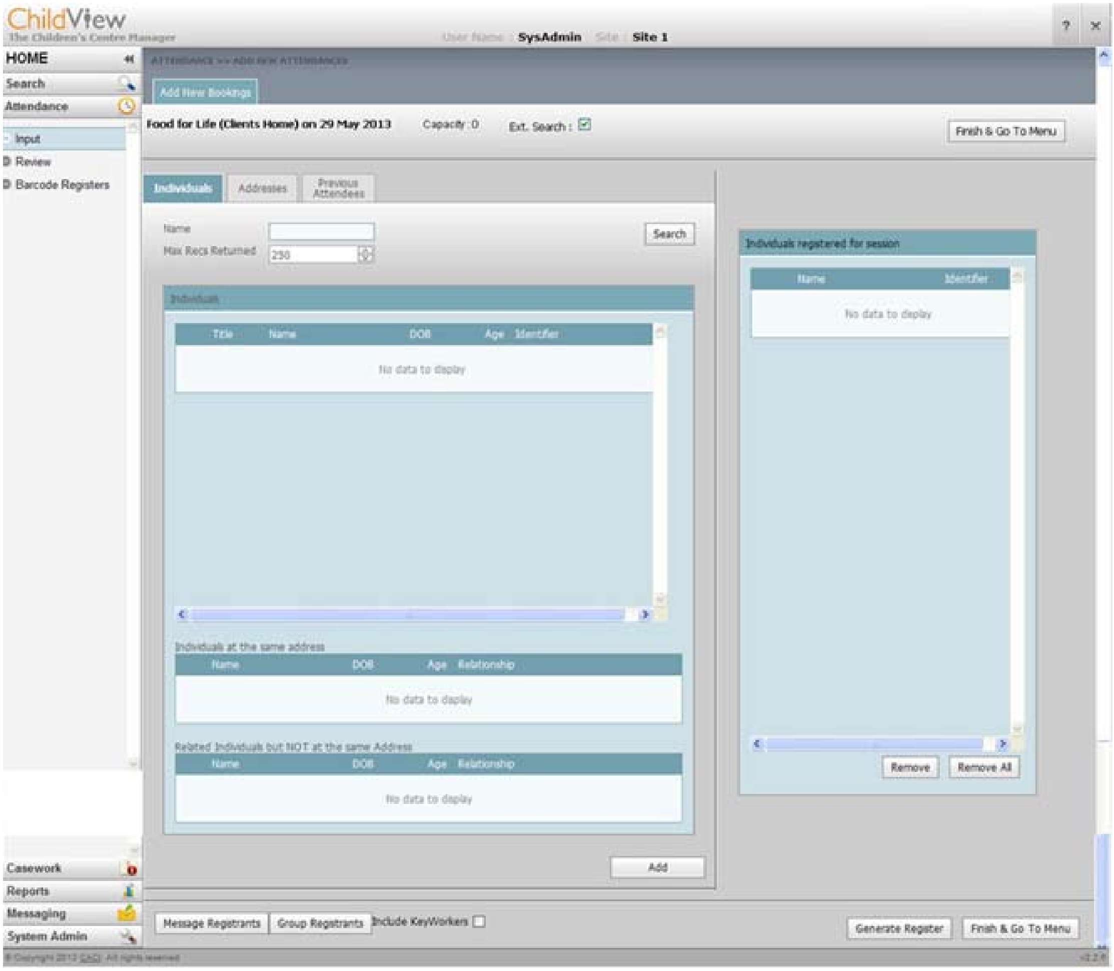
2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the ‘View Sessions’ button.



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:



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.

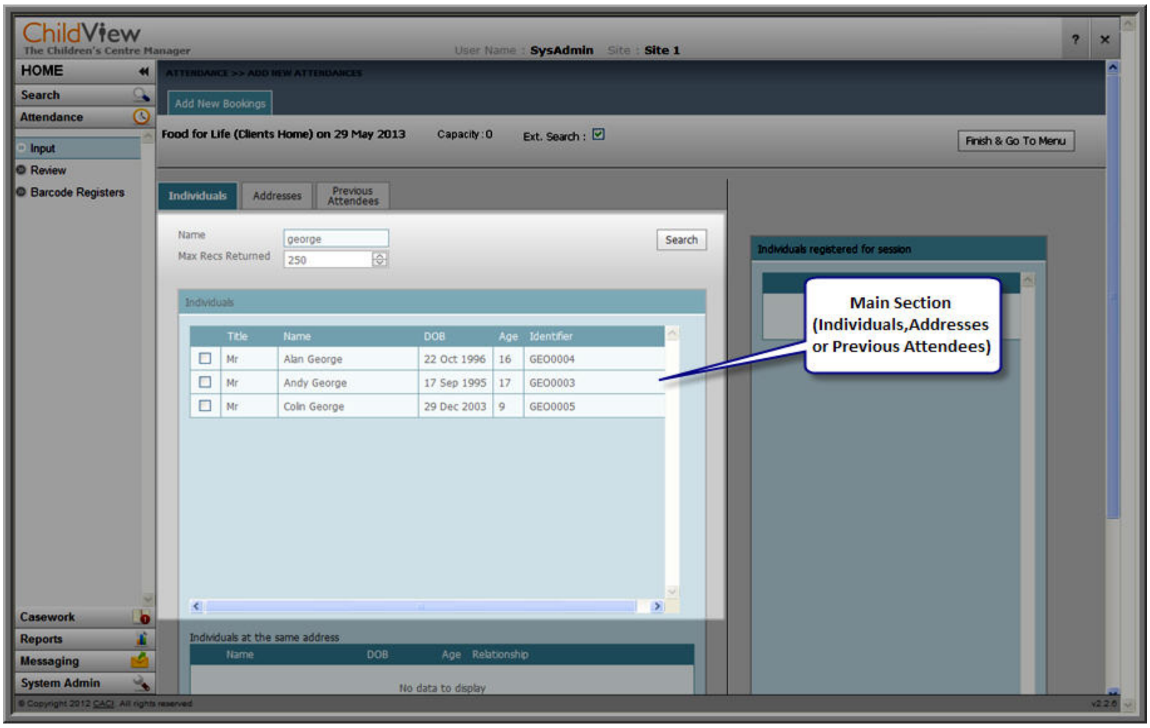
   In each case the number of records returned will be limited by the value in the 'Max Records Returned' box (default value 250).

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

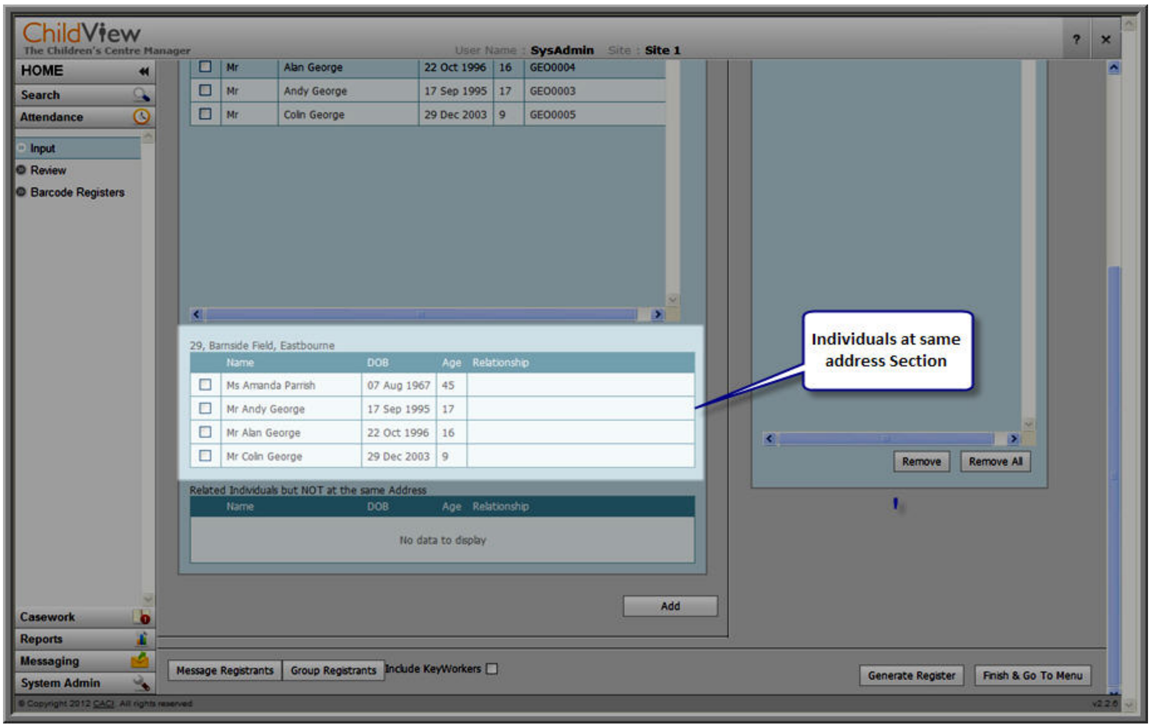
   Each Search Tab breaks down into 3 sections, as illustrated below. The Main Section in each case will reflect the main search results (Individuals, Addresses or Previous Attendees).

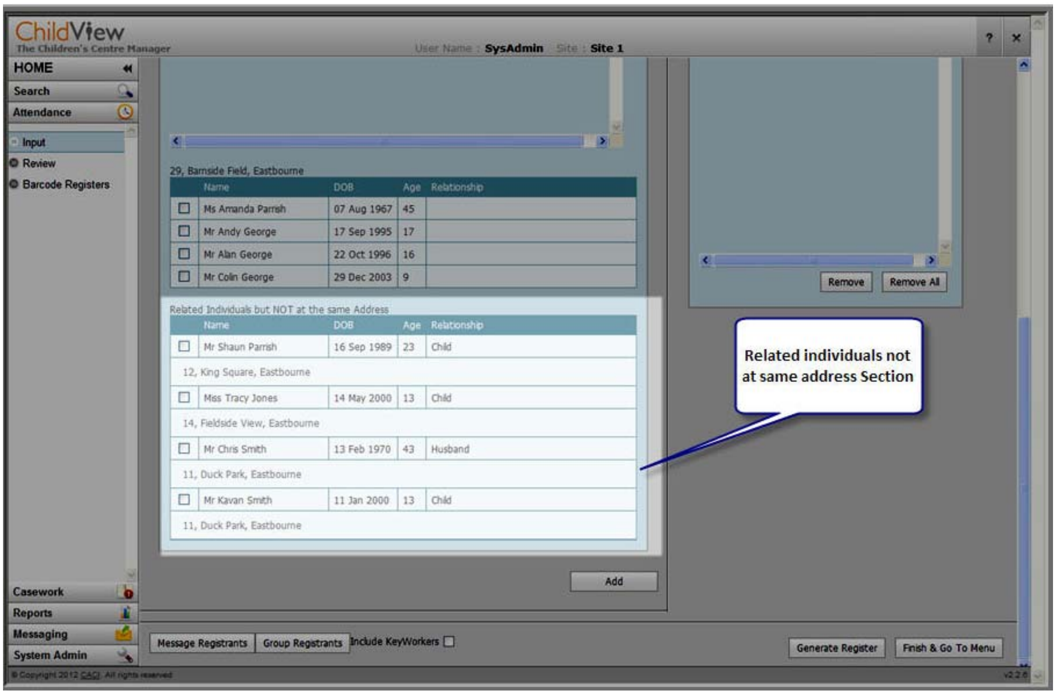
   When an individual or address in the top section is clicked, the middle section will display individuals who live at the same address. When an individual is clicked in the middle section, the bottom section will display any other individuals who are related to the selected individual, but don't live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

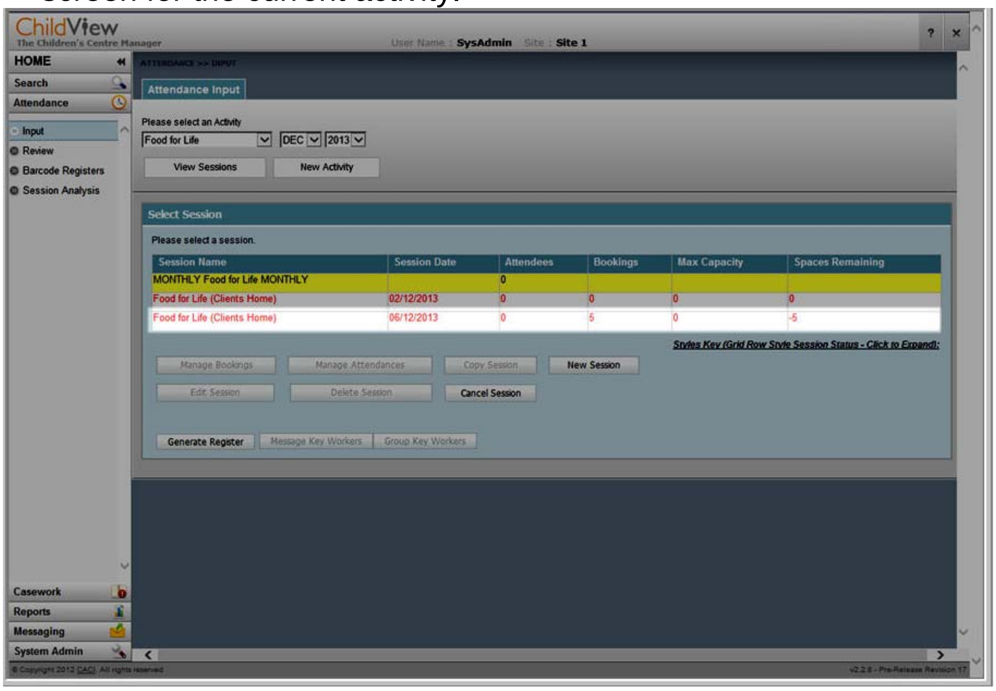




5. Within all 3 sections, individuals are booked into the session by ticking the selection box and pressing the Add button. If an individual appears in more than one section, the Add button will only add them once. Double clicking an individual will also book them into the session.

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**

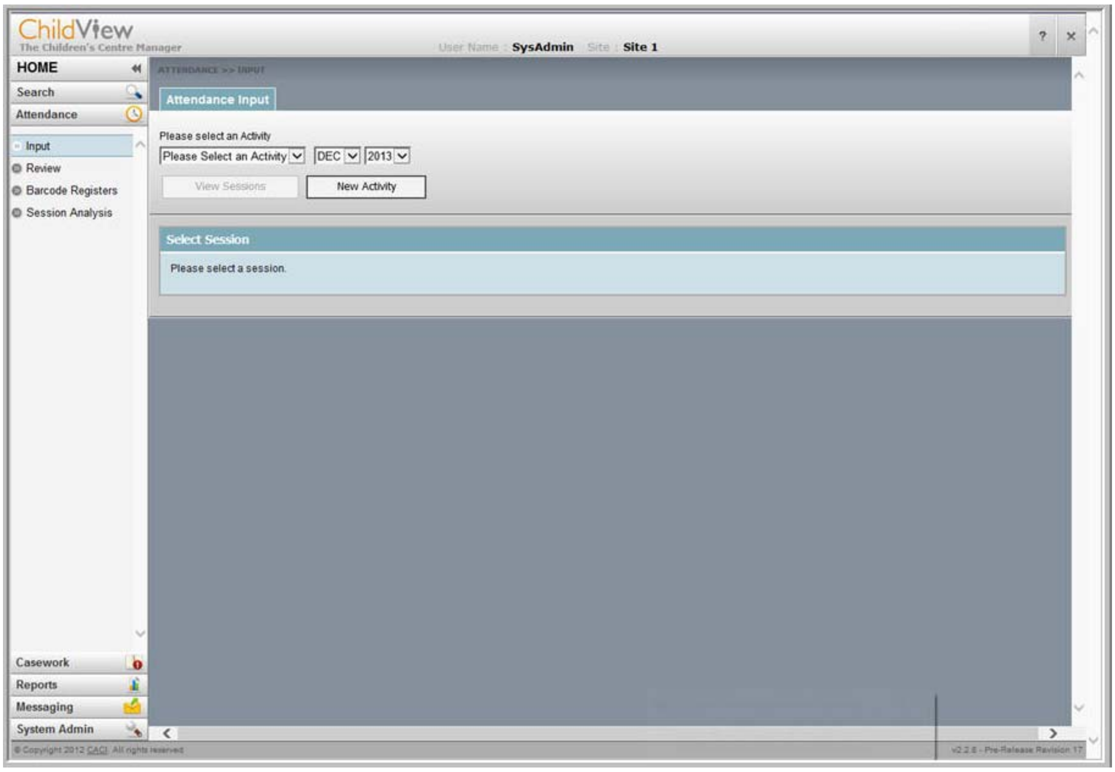
Should you wish to view the names of those people who are actually booked on the session, select the session of interest from the summary page and press the 'Manage Bookings' button.

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

1.5. Copying sessions

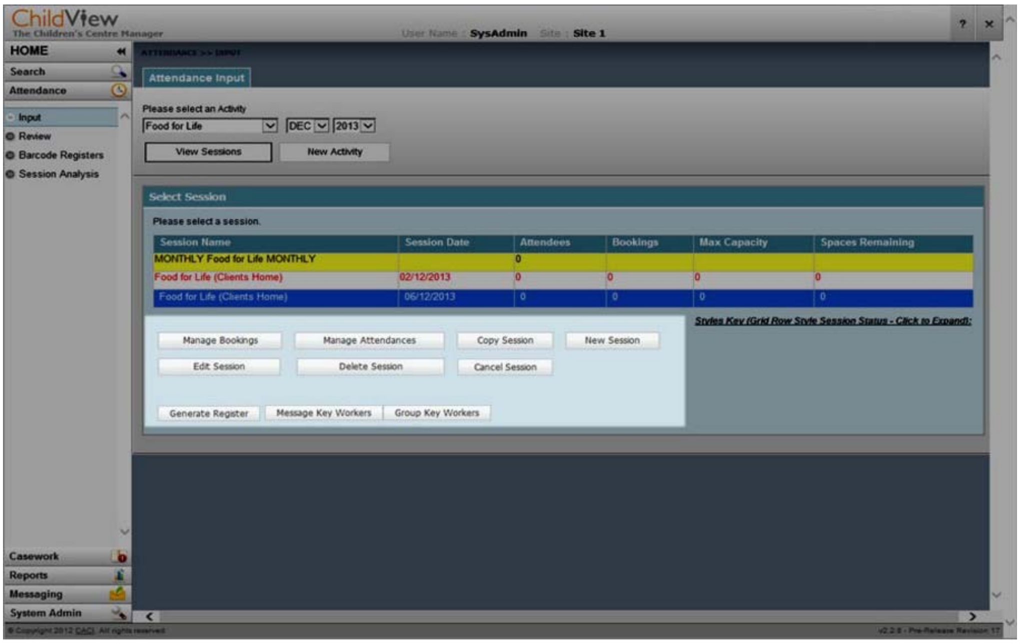
Rather than create a new session and input all the necessary criteria again it is possible to copy an existing session and specify the bits of information you wish to copy.

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

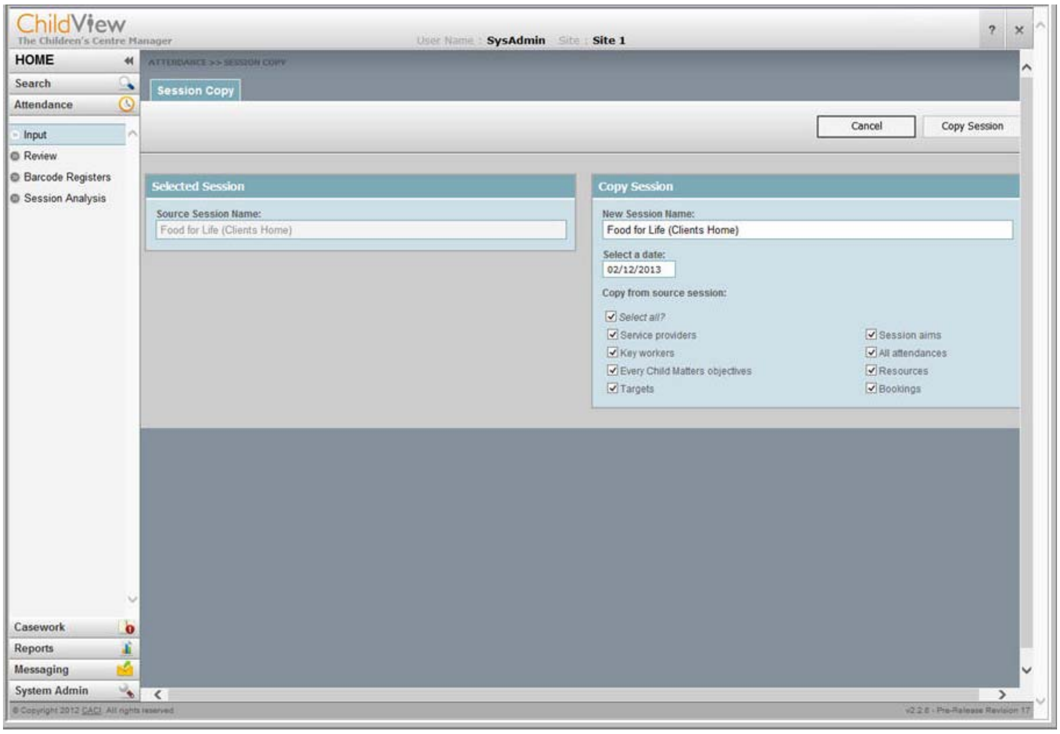


2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.

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



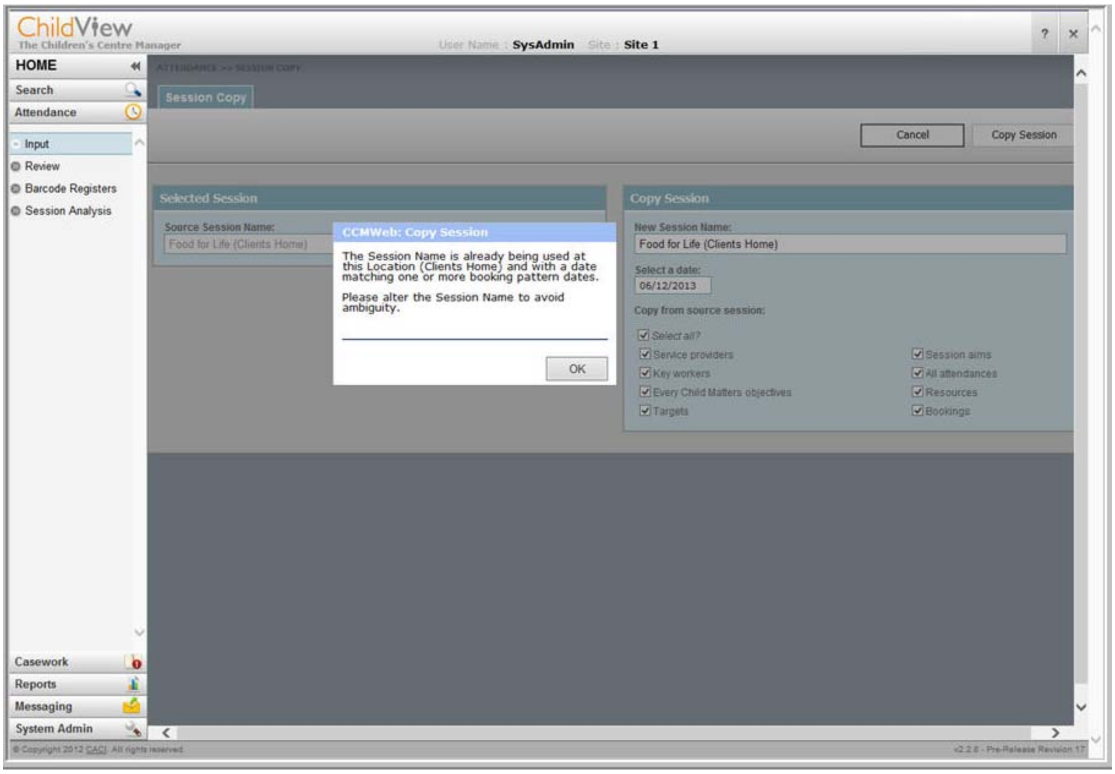
Pressing the 'Copy Session' button will open the following screen:



4. You can now specify a new date for the session as well as specify which bits of information you wish to copy.

5. Once you have done this press the 'Copy Session' button to create your new session.

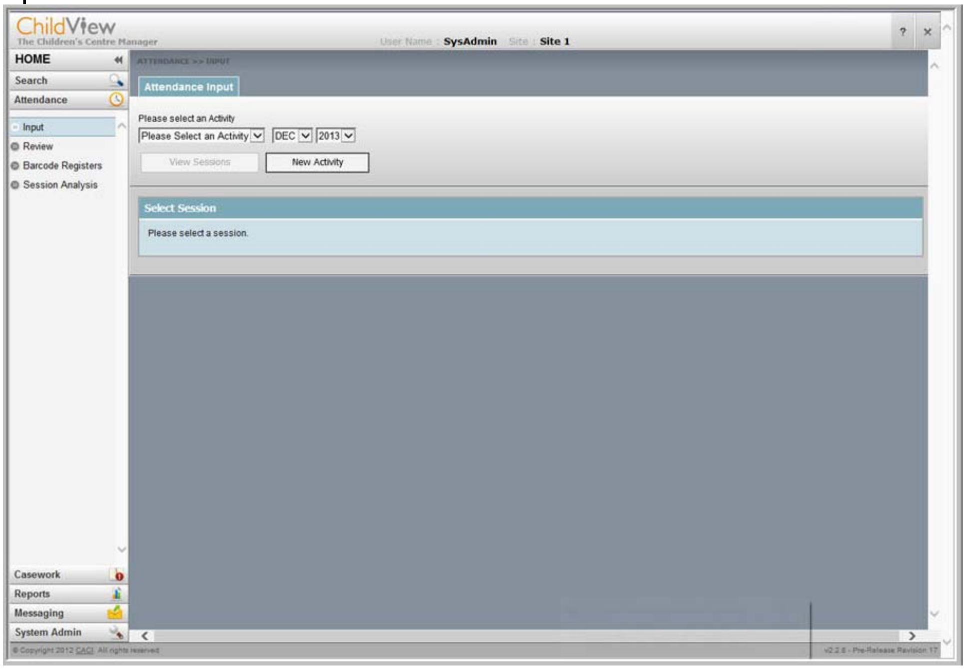
You will be warned if an existing session is already in the system for the new session date specified:



1.6. Editing sessions

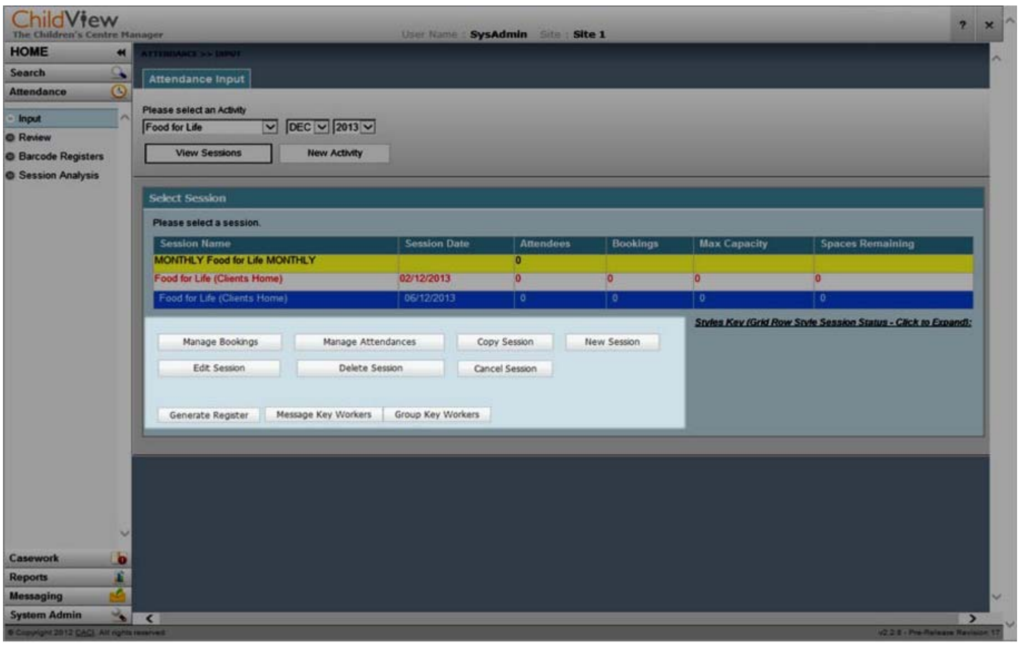
It is possible to edit the details of an existing session.

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:



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.

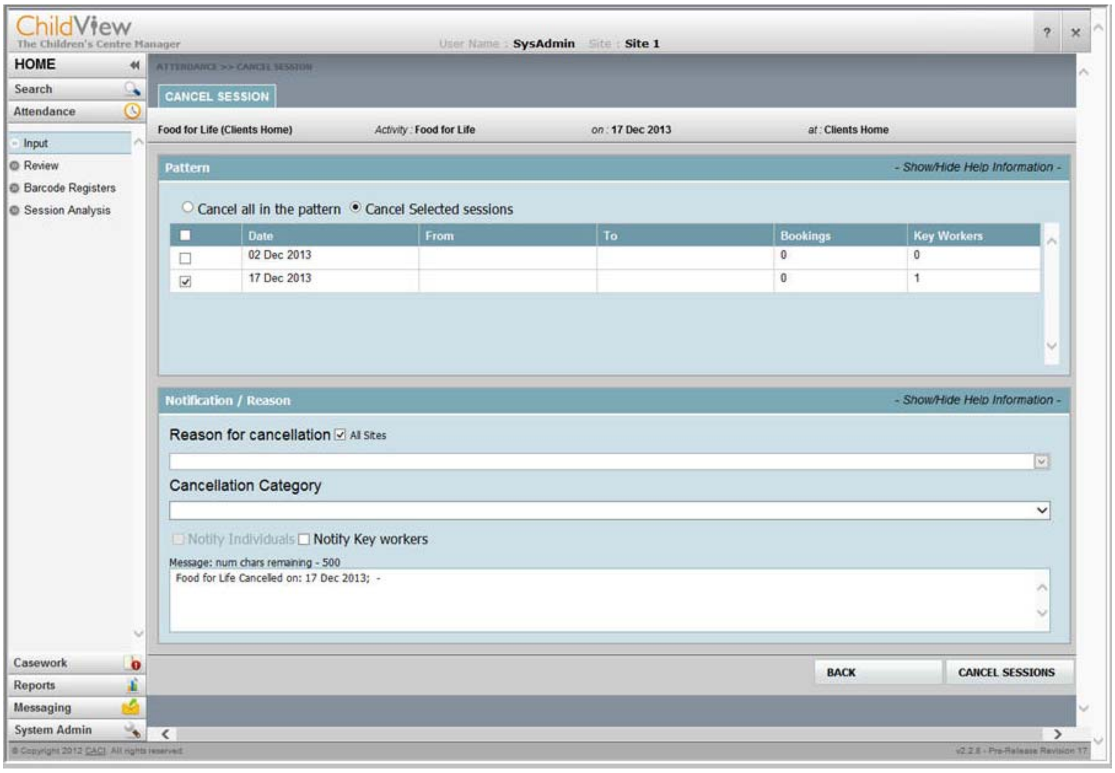
Note: you should record all planned sessions, and cancel them on the system if there were no session attendees.

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:

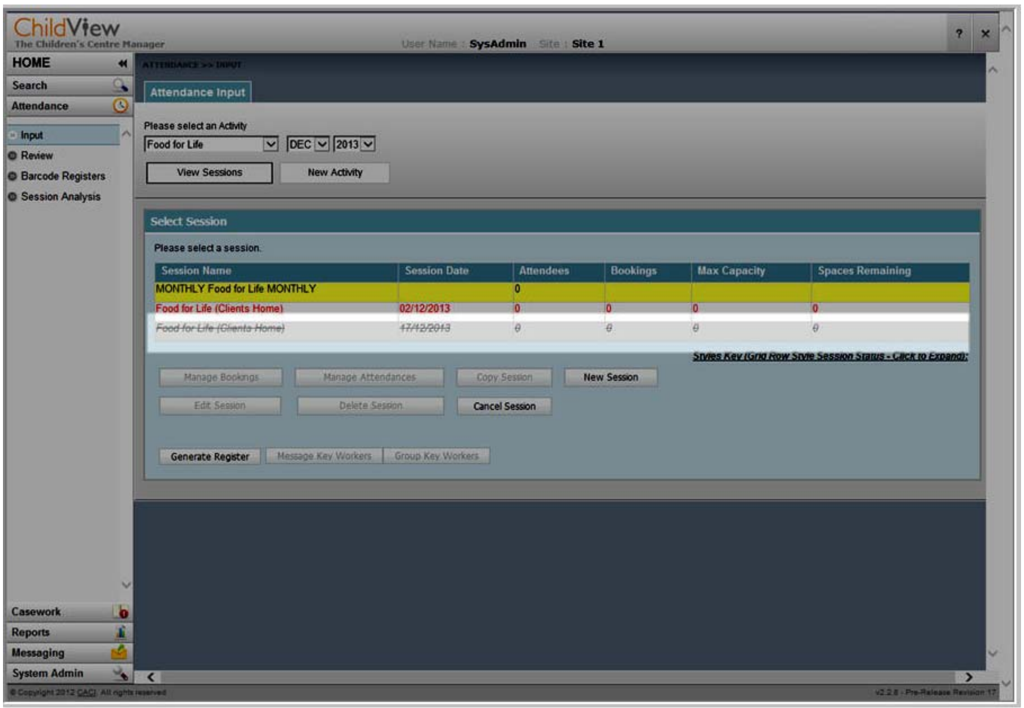


All session that have no associated attendances are listed and the selected session is ticked.

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.

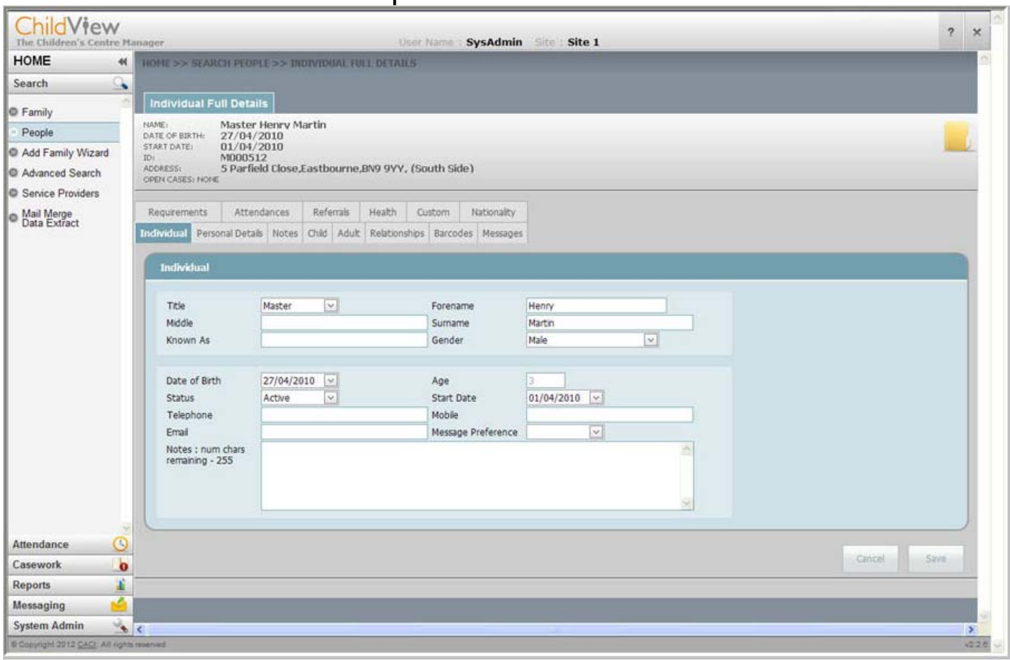


If the cancelled session is selected, the Cancel Session button will change to Activate Session.

Section 4: Individual full details

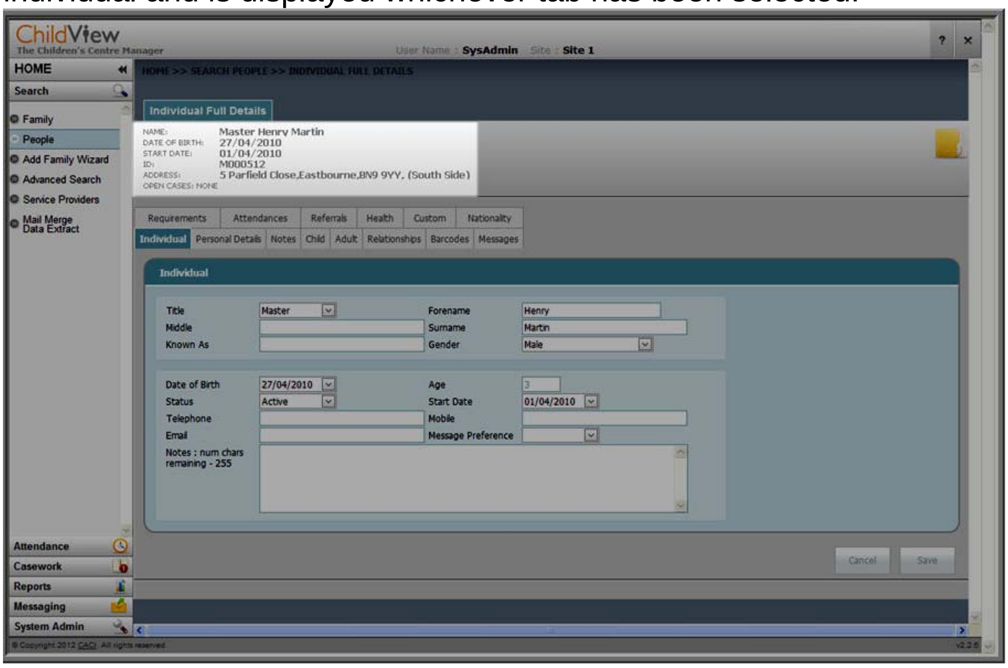
1.1. Individual full details

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.

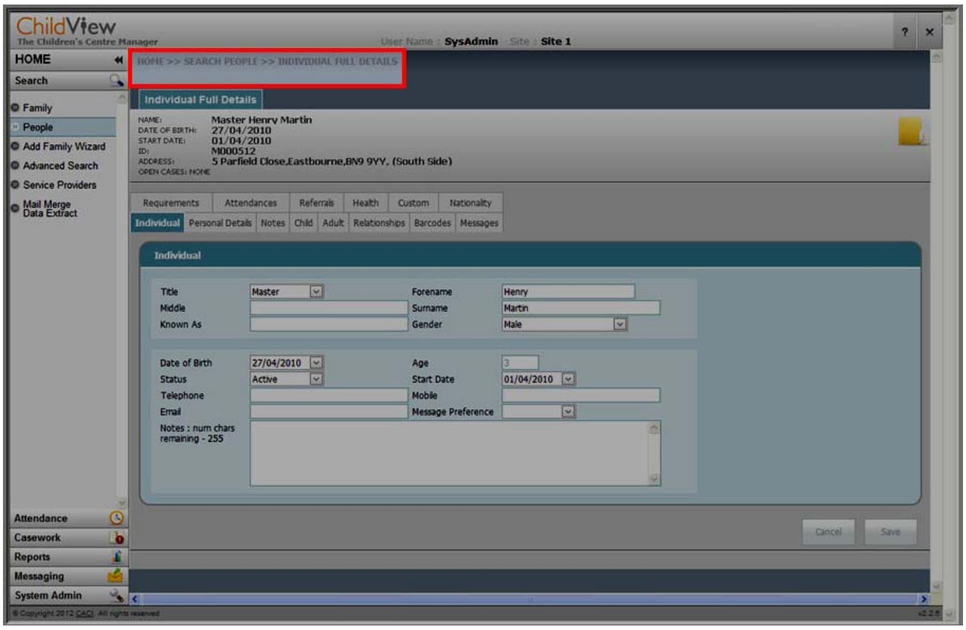


General information

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



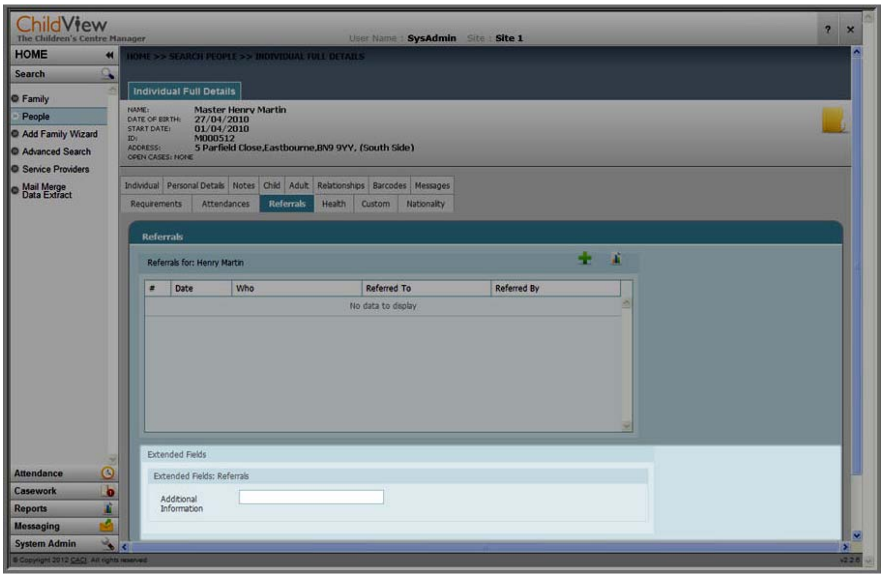
Bread crumb



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).



The tab options are:

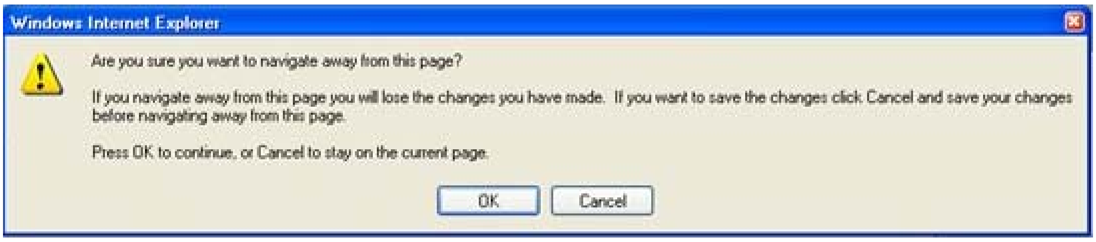
- Individual - overview of personal details
- Personal Details - in depth information
- Notes - both confidential and non-confidential in nature
- Child
- Adult
- Relationships.
- Barcodes - We will start using this in Summer 2014
- Requirements - information about disabilities and special needs
- Attendances
- 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.

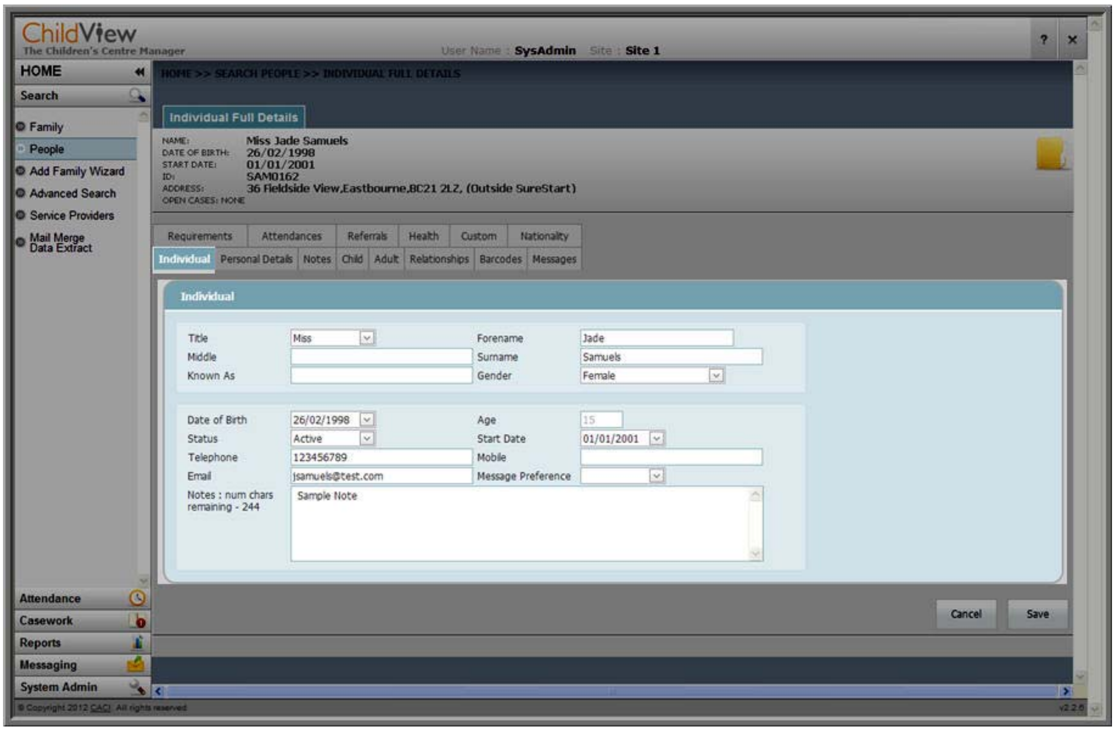
If you make changes, then move off of the Individual Full Details screen without pressing 'Save', you'll be asked to confirm the action:



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:



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

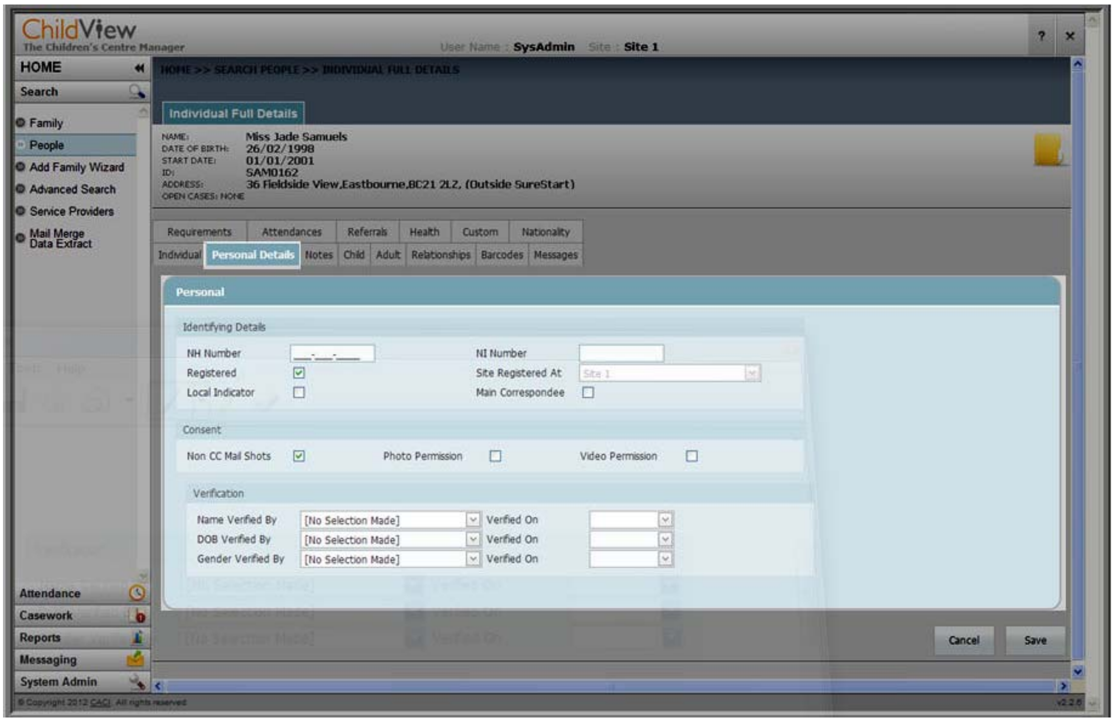
This field will allow you to stores notes up to 255 characters in length. Should you need to store additional information (including confidential information) please use the extended notes functionality as described in Section 4 Individual full details, section 7.5.

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



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

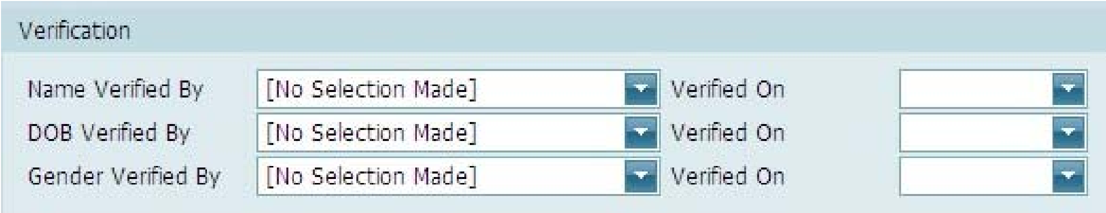
We do not use this indicator in Barnet.

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:

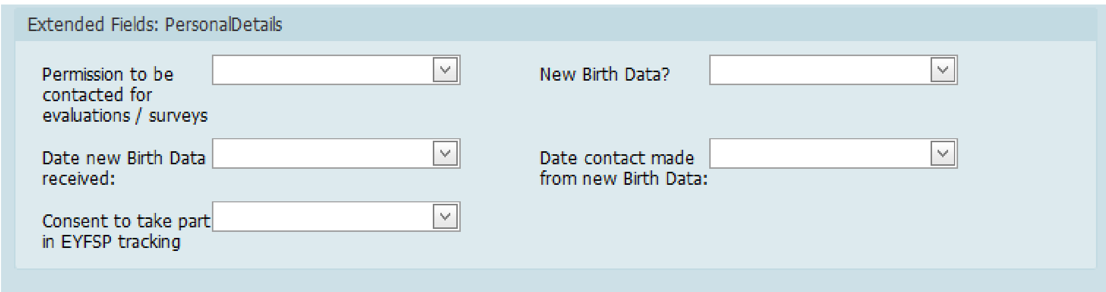


Click the applicable entry in the relevant drop down box as well as the date the verification took place. If you do not select a date then 'today's' date will be used.

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.



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.

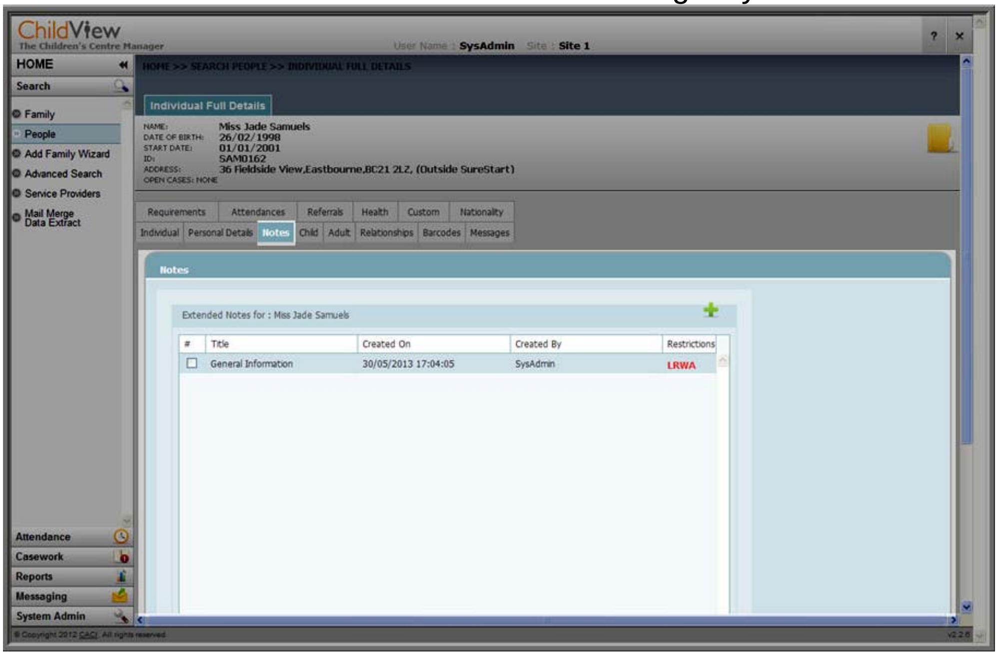
1.4. Notes

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.

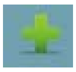
Any extended note for an individual will show on the screen along with an indication in the Restrictions column as to the rights you have over that note:

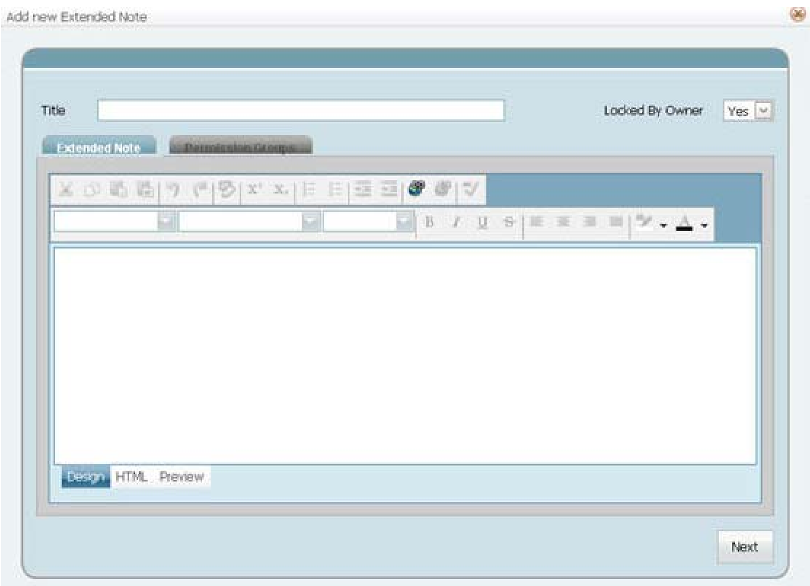


L = Locked by owner
R = Read
W = Write
A = Archive

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.

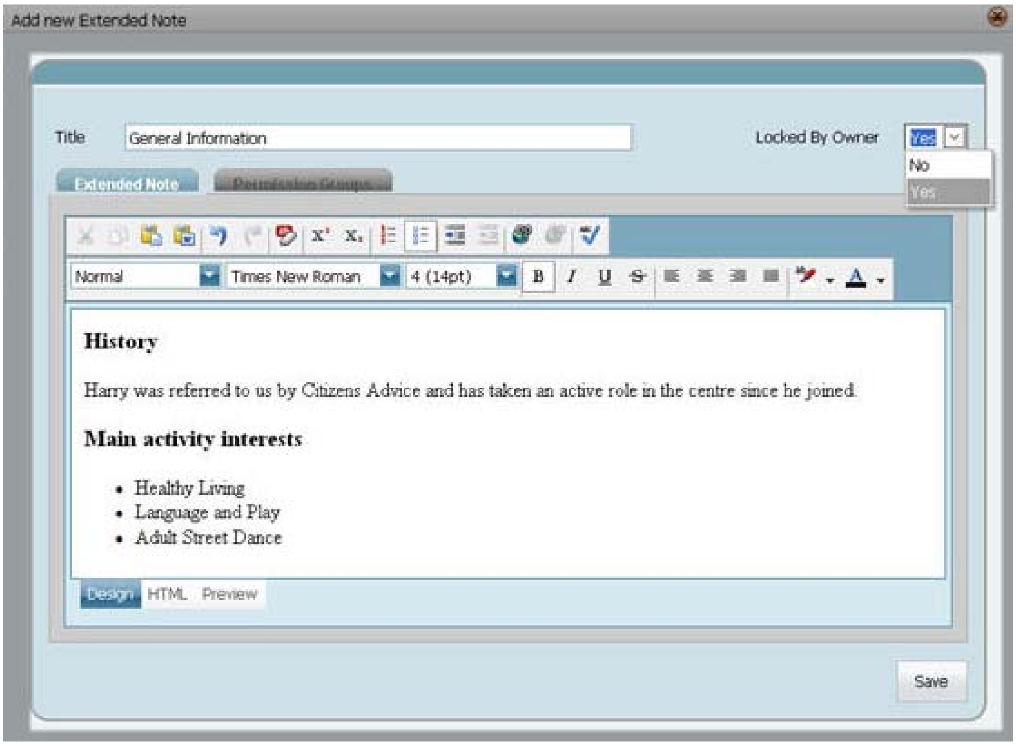
Note: The Permission Groups tab will only show if your user profile has the rights to create confidential notes.

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.

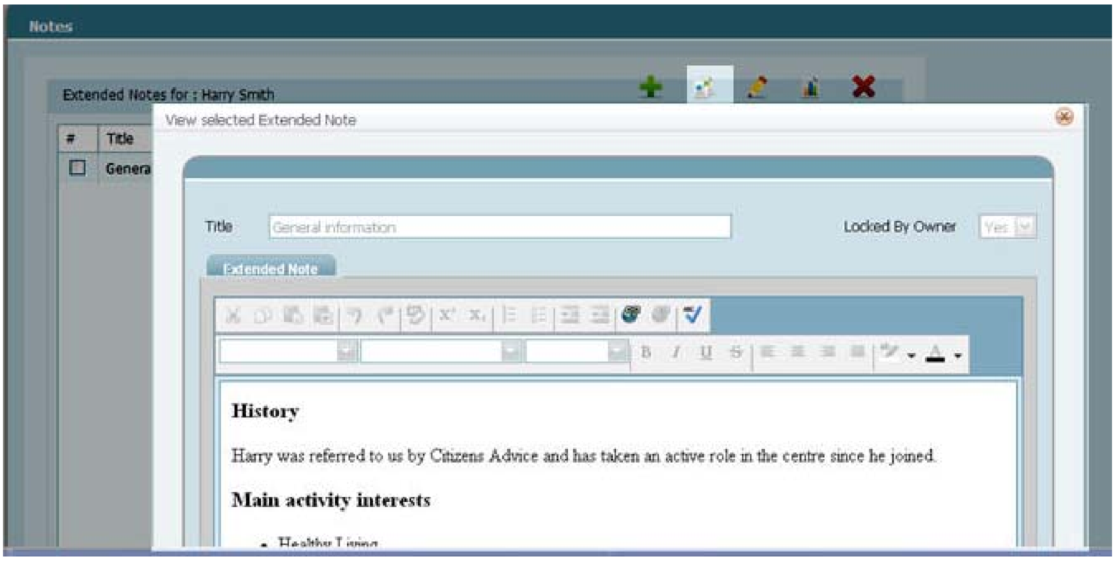
Note: any images copied will not be saved in the database - the extended notes field is only relevant for textual information.

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



Viewing a note

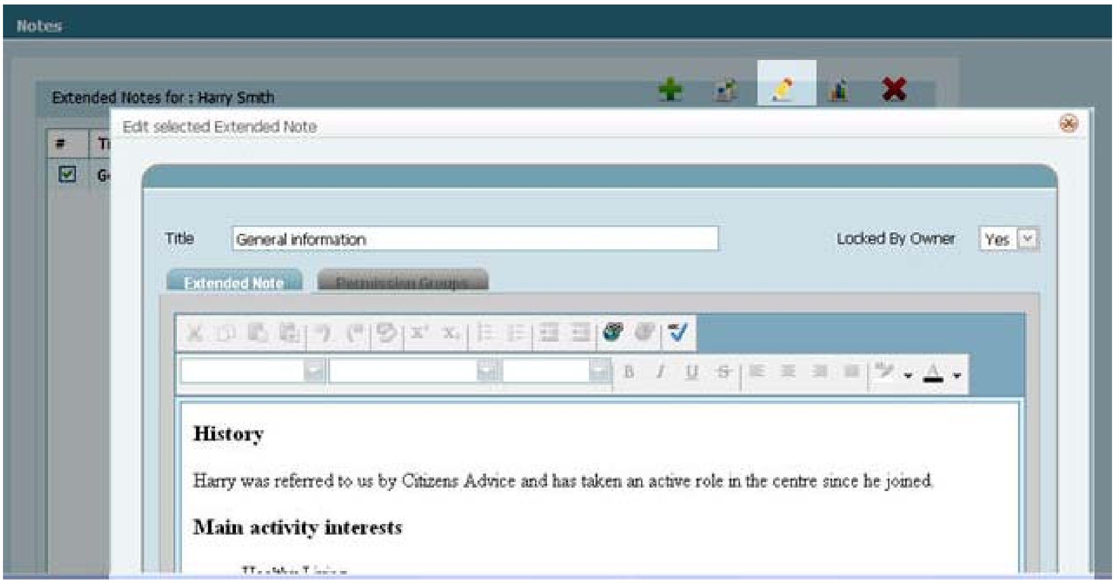
To view an existing note select the applicable entry in the extended notes grid and then click on the view extended note icon that will become available:



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

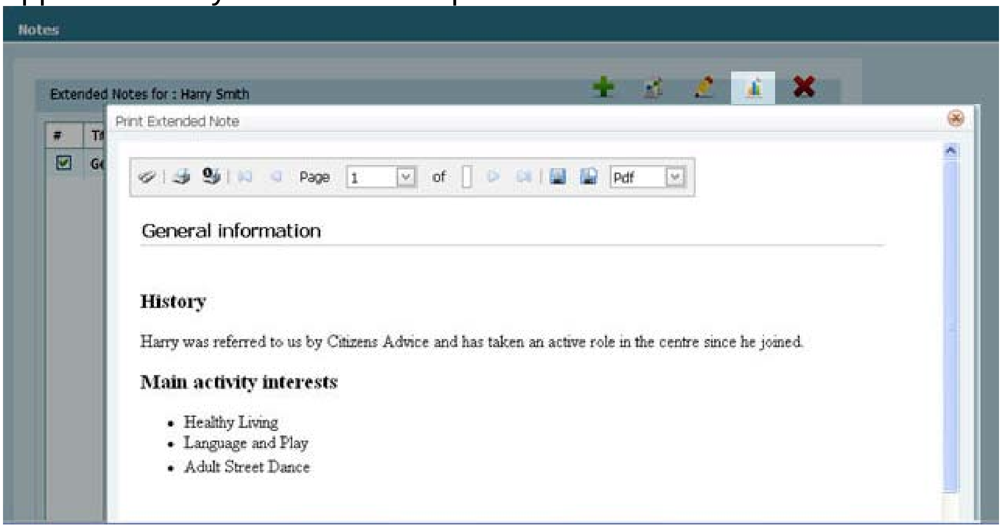
To modify an existing note select the applicable entry in the extended notes grid and then click on the modify extended note icon that will become available:



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:

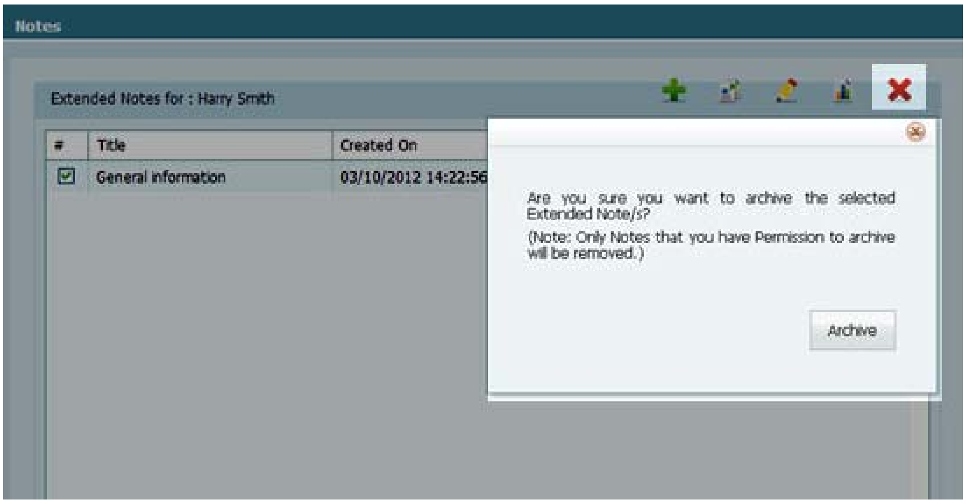


Once the Print Extended Note screen has shown press the relevant button in the toolbar at the top of the screen.

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:

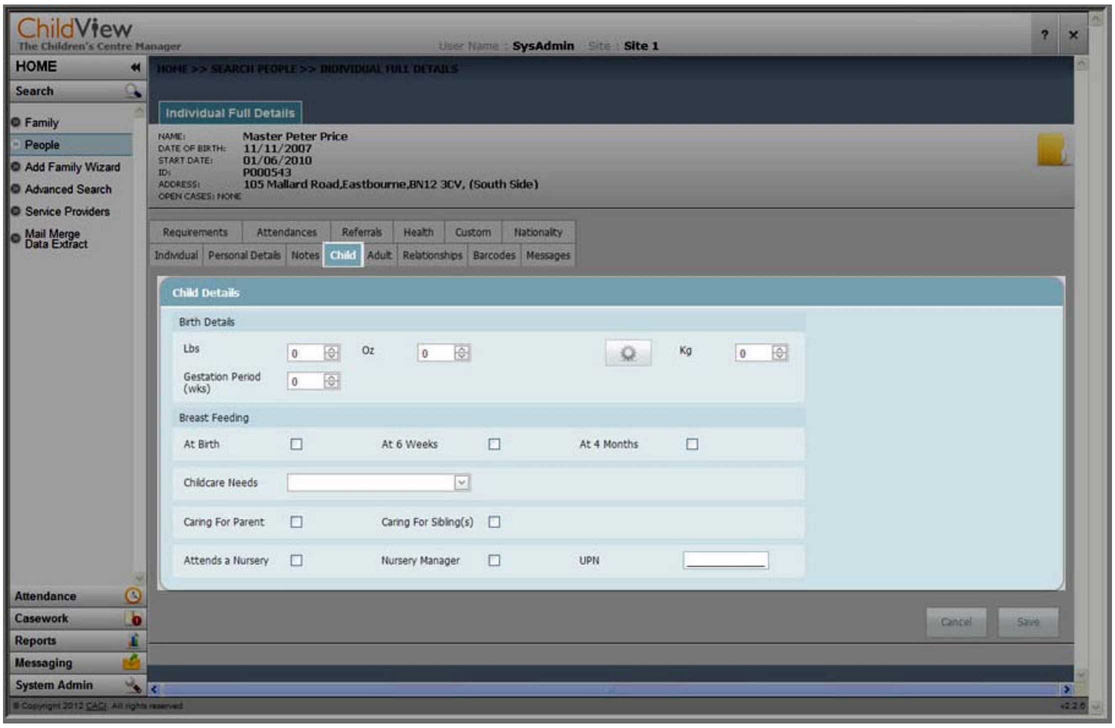


Once you have confirmed that you wish to archive the note nobody will be able to view it.

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.



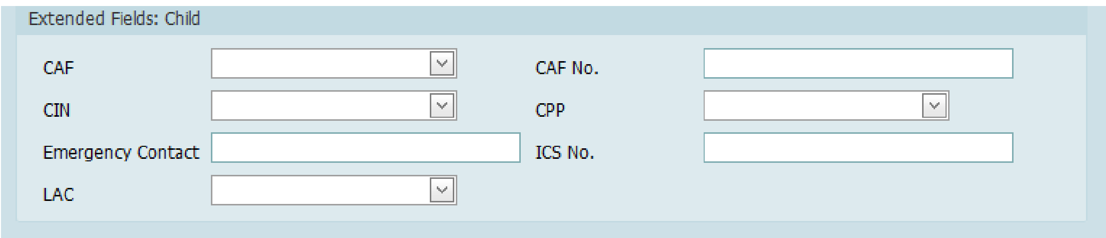
Birth Details

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.

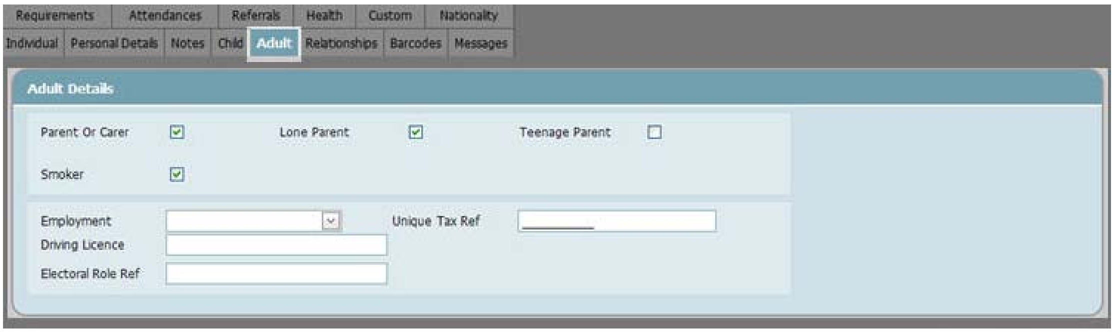


Please note: CIN, CPP and LAC information feeds into performance reports.

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.

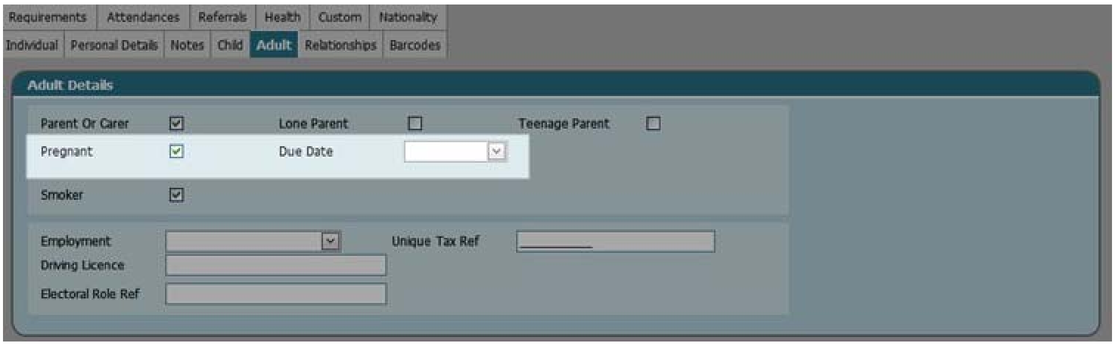
The image below shows details for an adult male:



The image below shows the details for an adult female:

Pregnant

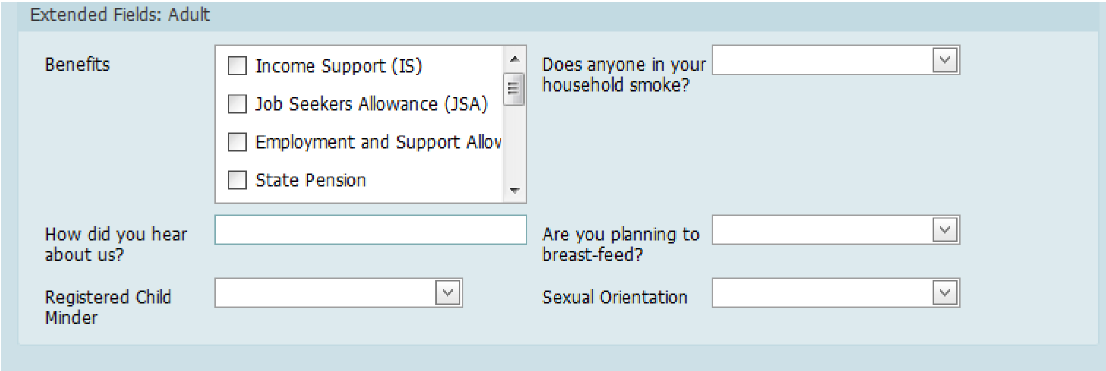
Setting the pregnant drop down box to yes will cause the Due Date field to become visible:



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

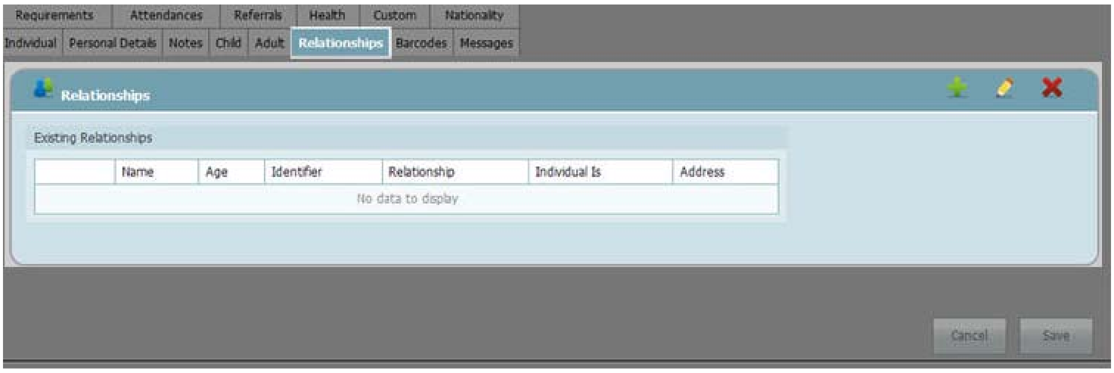
The extended fields are local to the Barnet system.



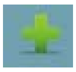
1.7. Relationships

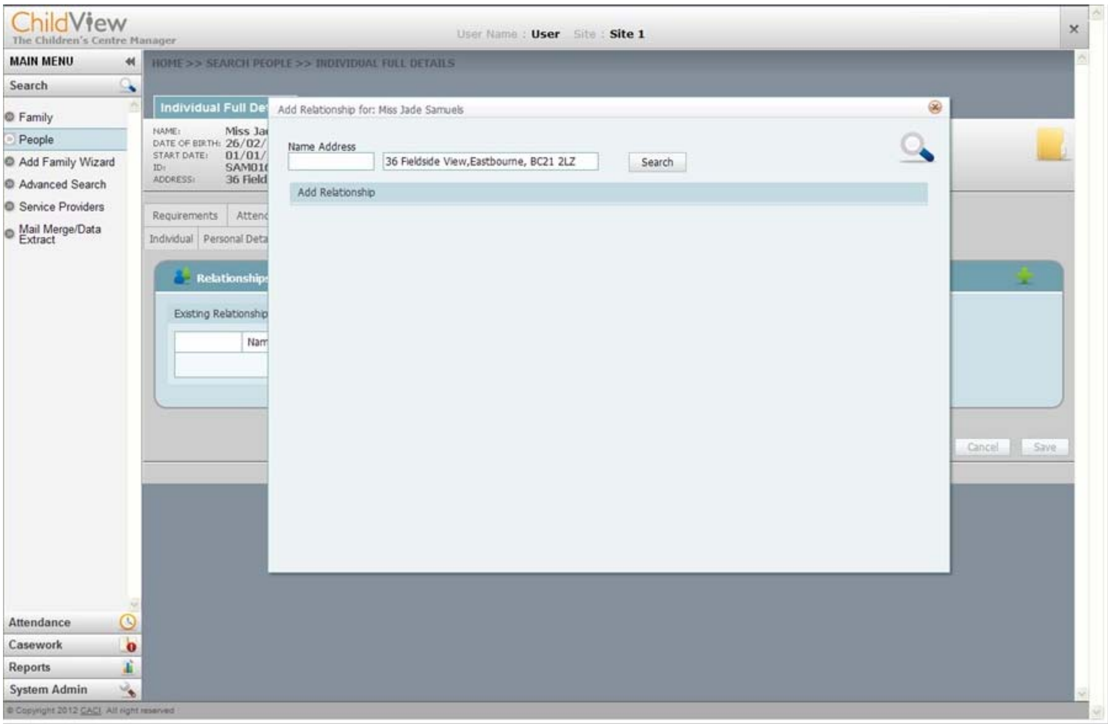
This tab details any family relationships that may have been set (see Section 6: Add family wizard, section 6.5 for information on how to set up family relationships when individuals are entered in the database).

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



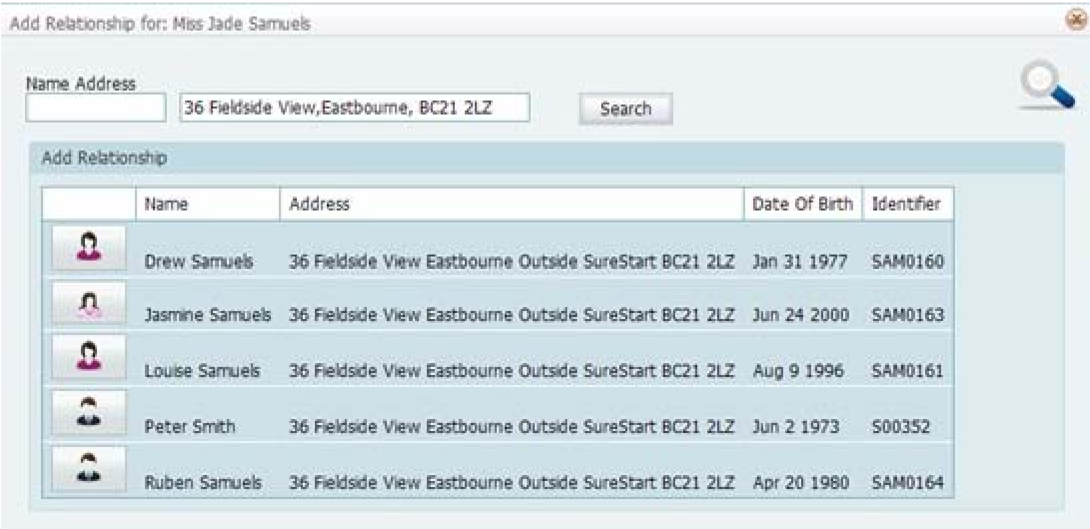
Creating new relationships

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:



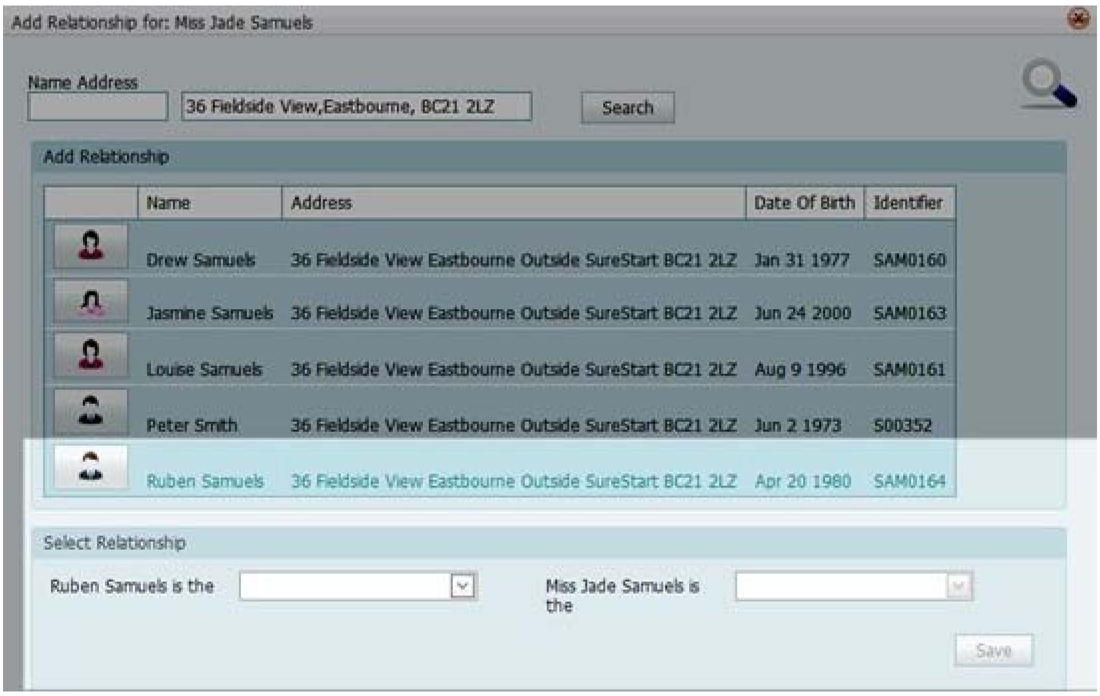
By default the address where the individual lives will populate the Address field. If the person we are setting up a relationship with does not live at the same address you can enter alternative search criteria in the Name & / or Address field.

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

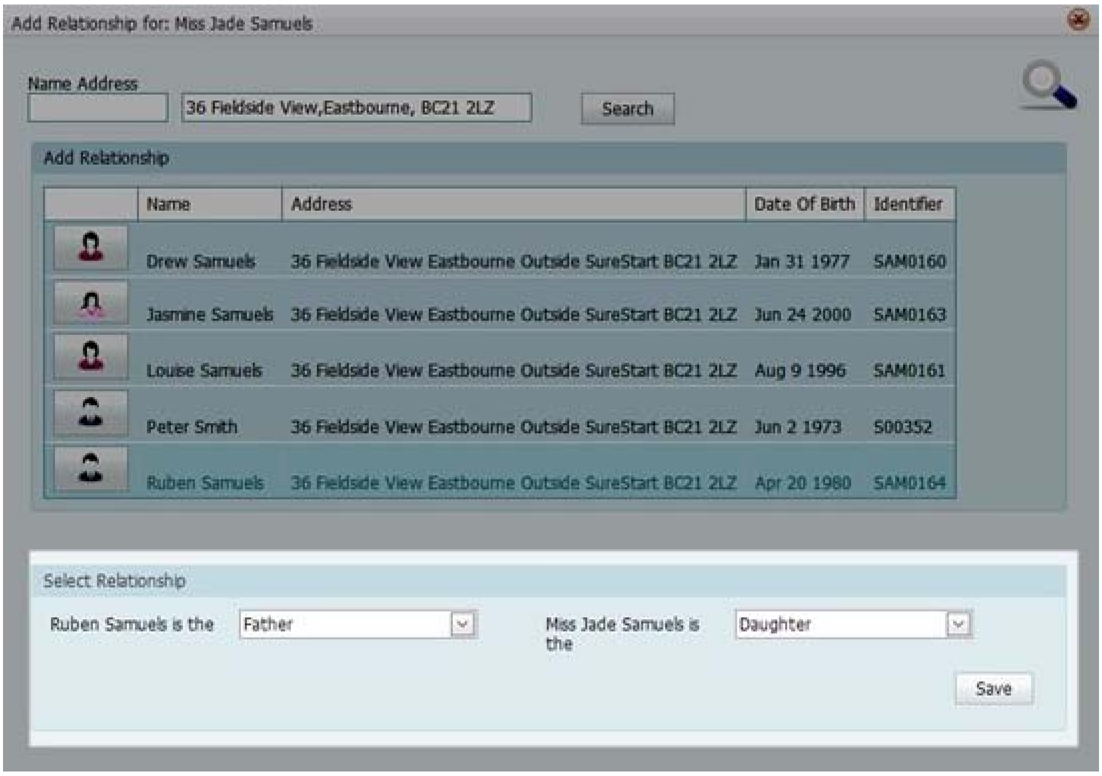


Note: Searching will operate on a wild card basis on any word entered in the search box(es). For example searching for 'J Smith' will return a list of people where somebody has the letter J in their name and has the word Smith in their name

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:



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:

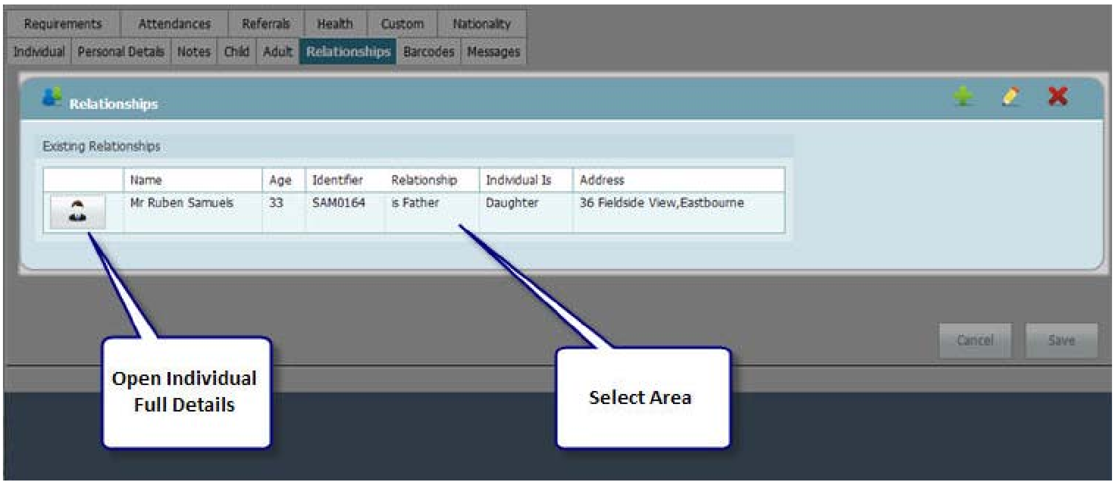


Pressing the 'Save' button confirms the relationship. You can then close the 'Add Relationship' screen if no other relationships needs to be added and view the relationships for the person:

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.

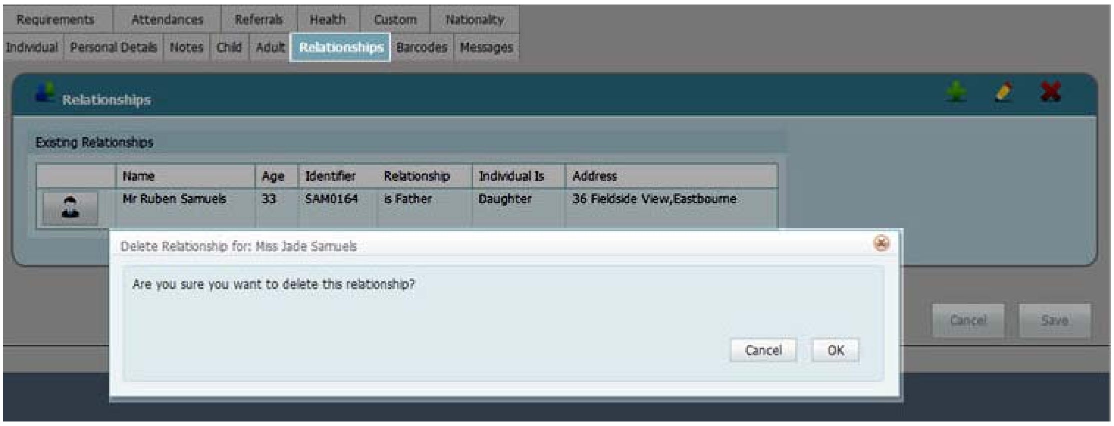
Clicking the Individual icon will open Individual Full Details for the selected individual.



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

Deleting relationships

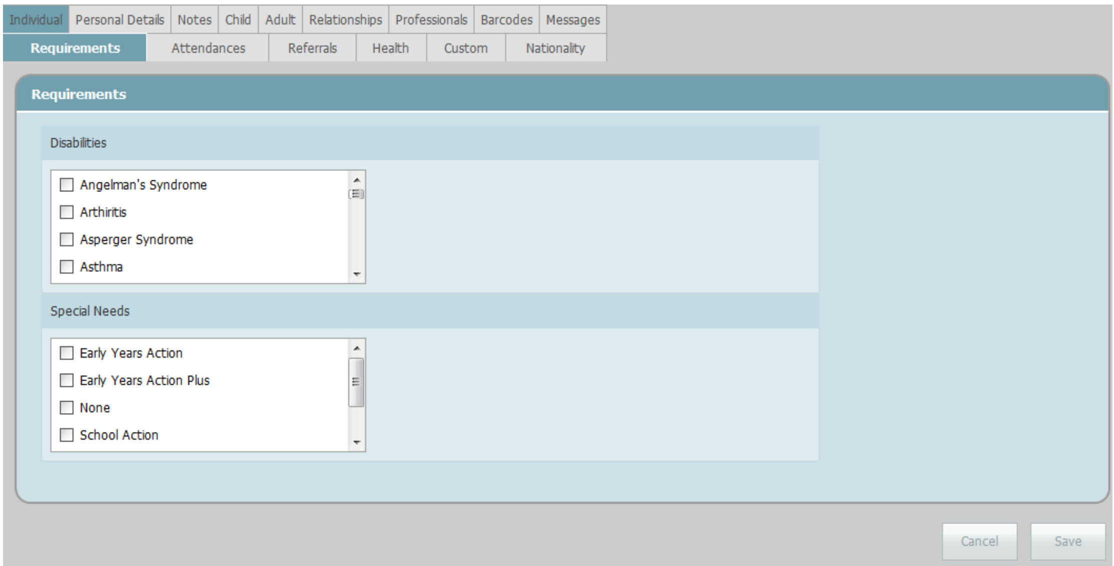
If you wish to delete an existing relationship then select the applicable entry and a delete icon () will become available:



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

1.8. Requirements

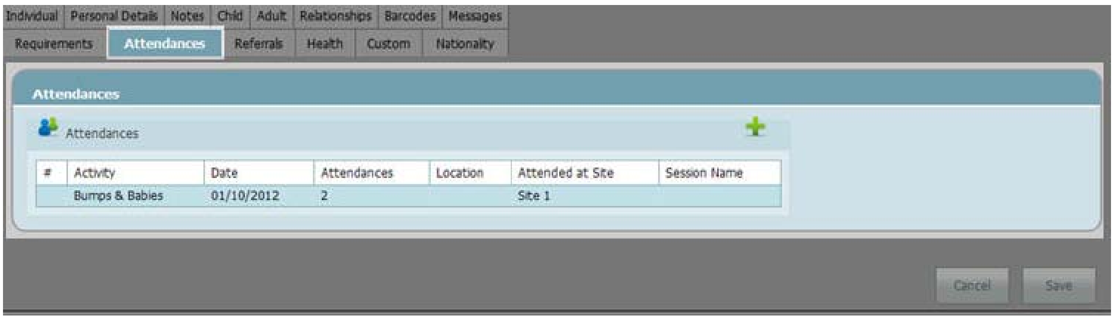
Clicking on the Requirements tab allows you to view / modify any requirements for a person as shown below:



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

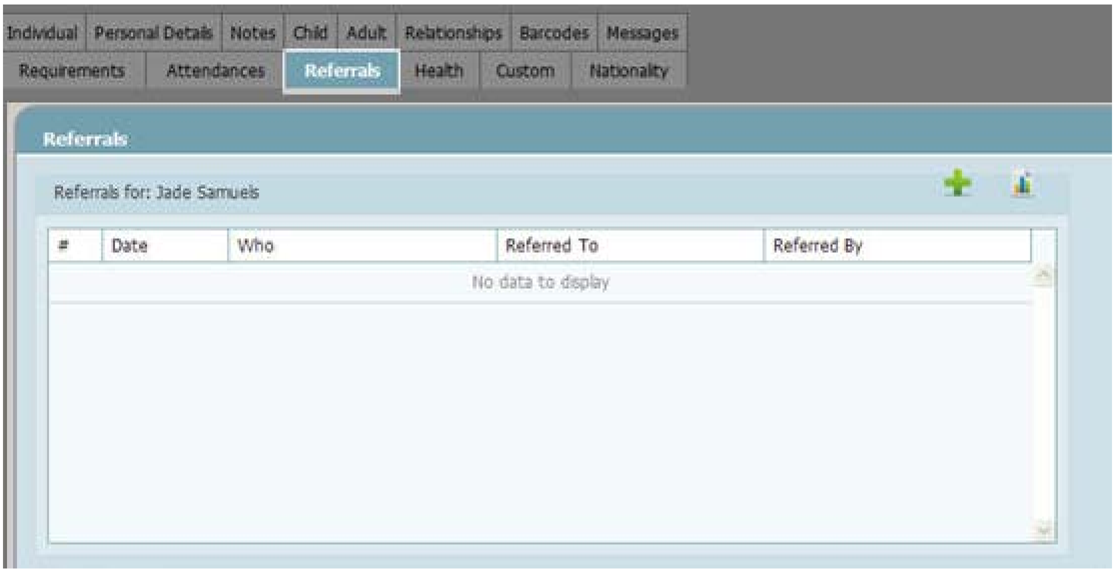
This tab details any activities that the individual has attended.



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

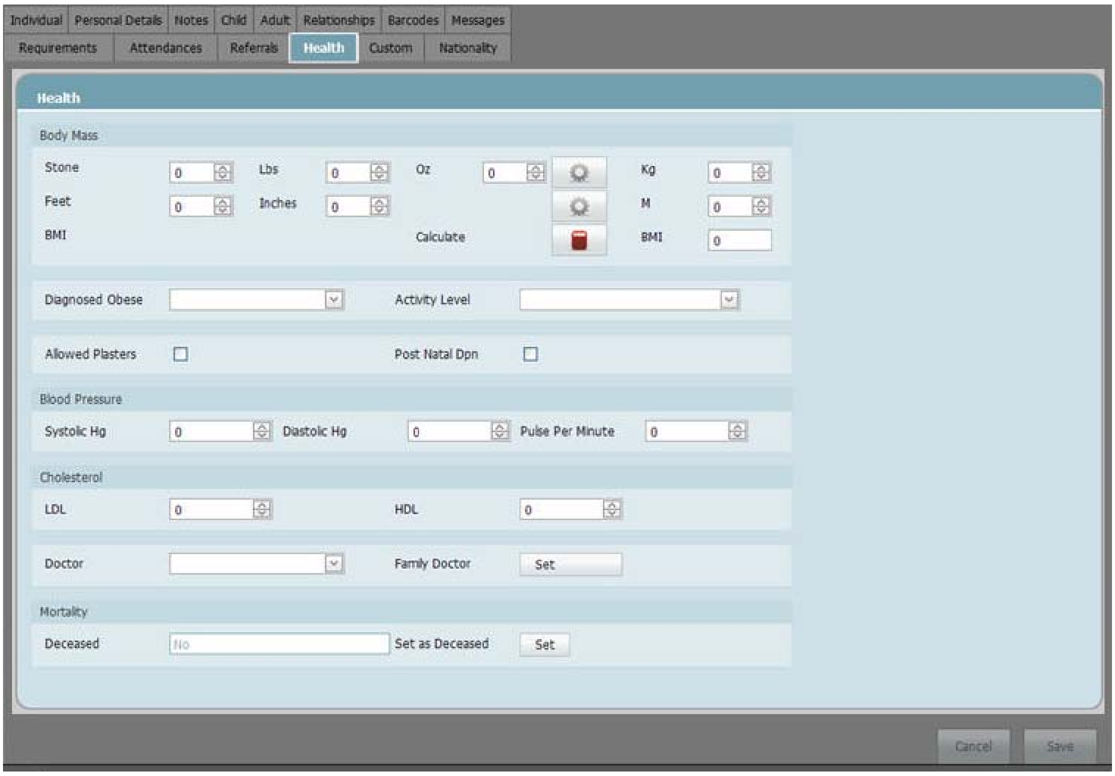
1.10. Referrals

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.



1.11. Health

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



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.

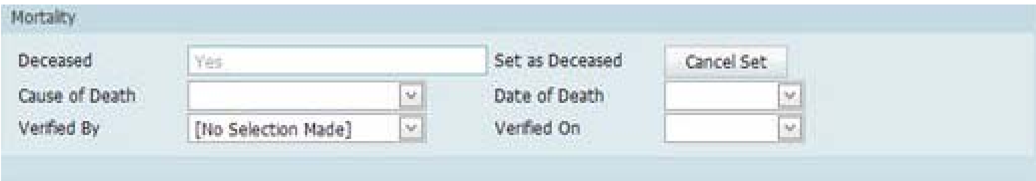
Note: Although Metric weight & height information is stored in the database you will be able to view the English weight / height information in the respective fields when you view a person's Individual Full Details.

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.

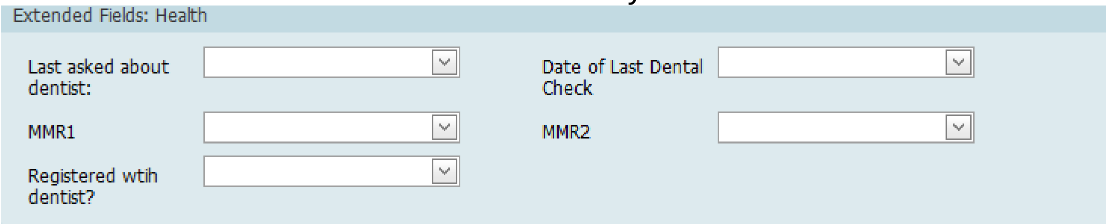
For the verified field you will also need to specify the date the verification occurred. If you do not select a date then 'today's' date will be used.

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.

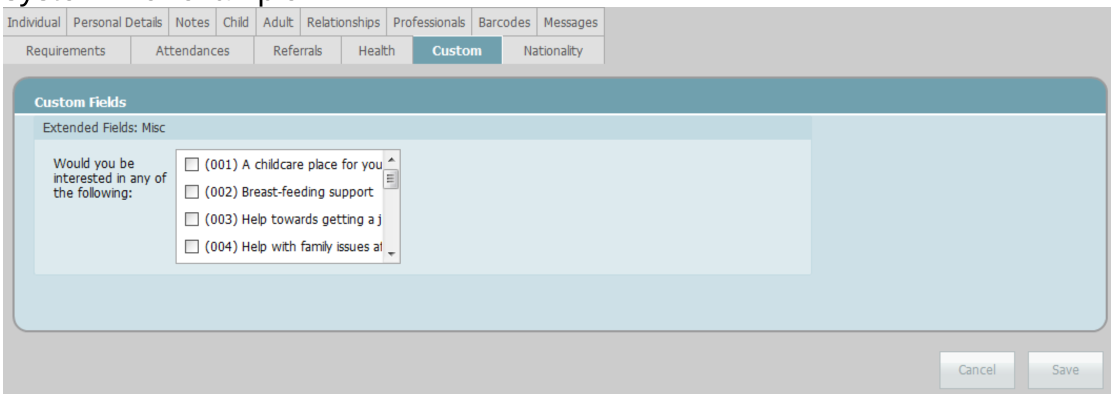
Extended fields

The extended fields are local to the Barnet system.



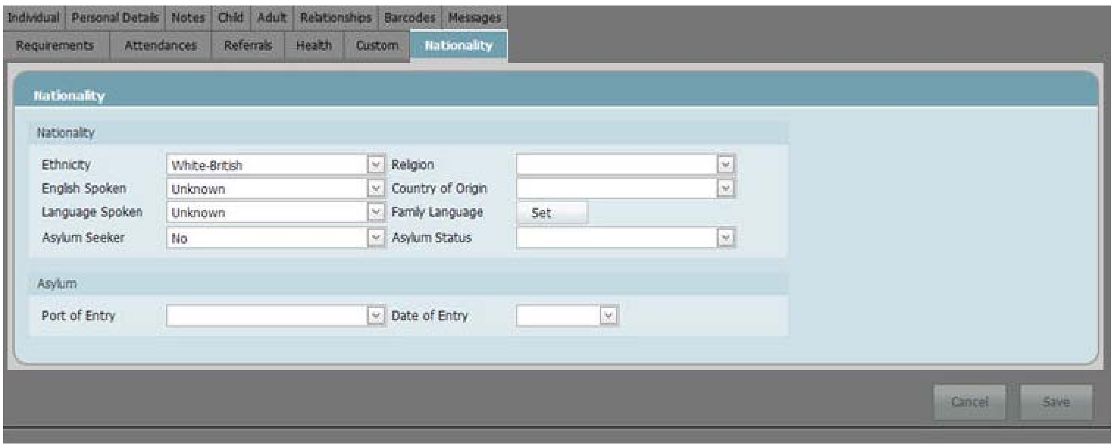
1.12. Custom tab

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



1.13. Nationality

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

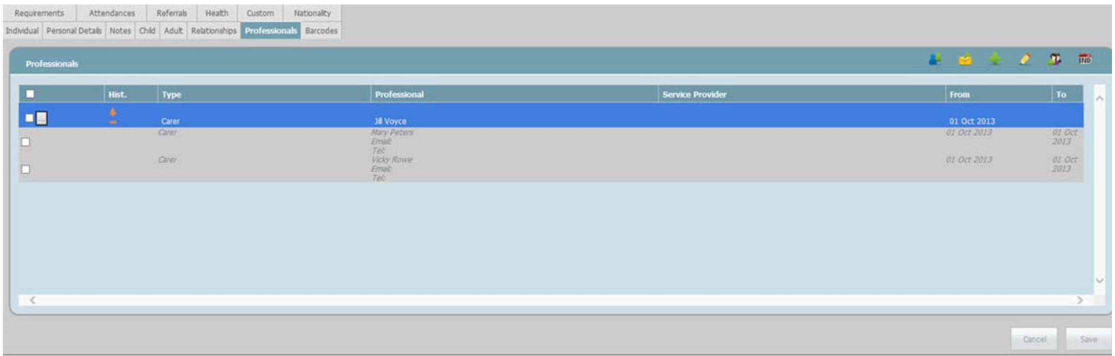


Pressing the 'Set' button will set the entry in the Language Spoken field to be applicable to all people who live at the address. The change will only take place once the 'Save' button has been pressed.

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.



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.

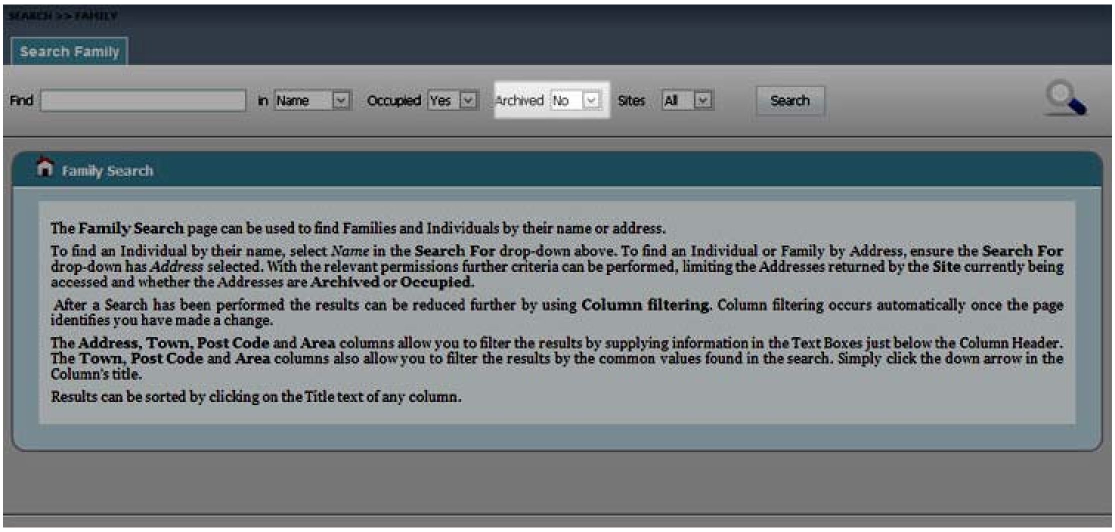
Search filters work the same, regardless of whether archived or non-archived options have been selected.

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

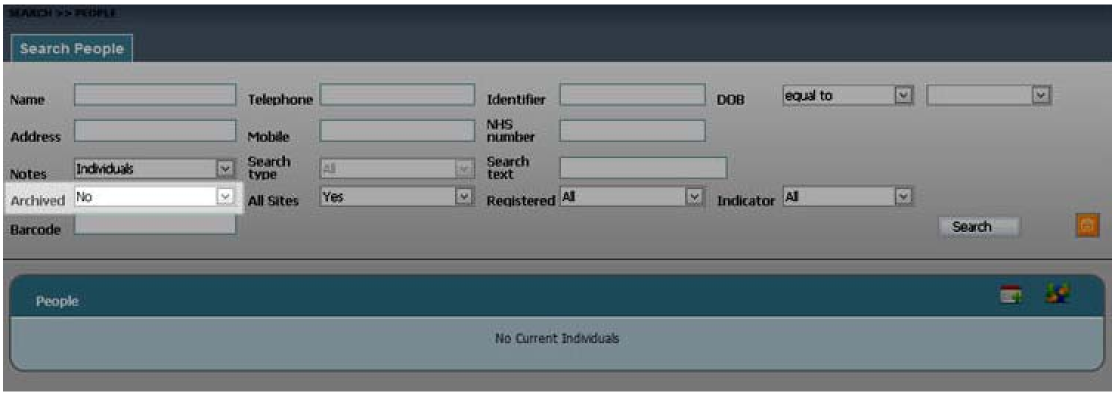
From the Search / Family route, click on the Archived drop down box:



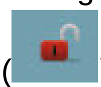
This drop down box determine if the search is to take place on those addresses that are archived (Archived = Yes), Un-archived (Archived = No) or both (Archived = All).

2.2. People Search screen

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



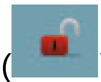
This drop down box determine if the search is to take place on those addresses that are archived (Archived = Yes) or un-archived (Archived = No).

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.

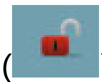
Un-archiving

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

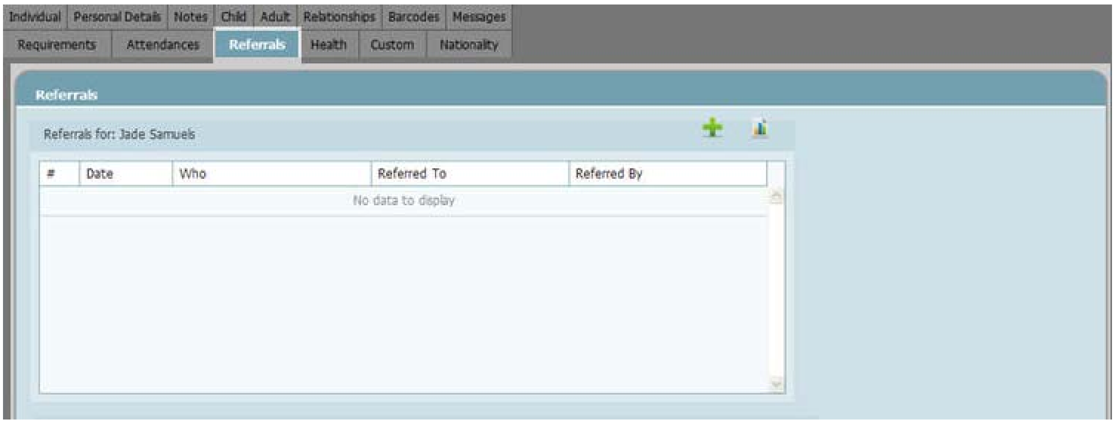
The Referrals System allows you to record and monitor information about people who have been referred to Key Workers, Activities and other Services (including services that are external to your Children's Centre Programme).

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:

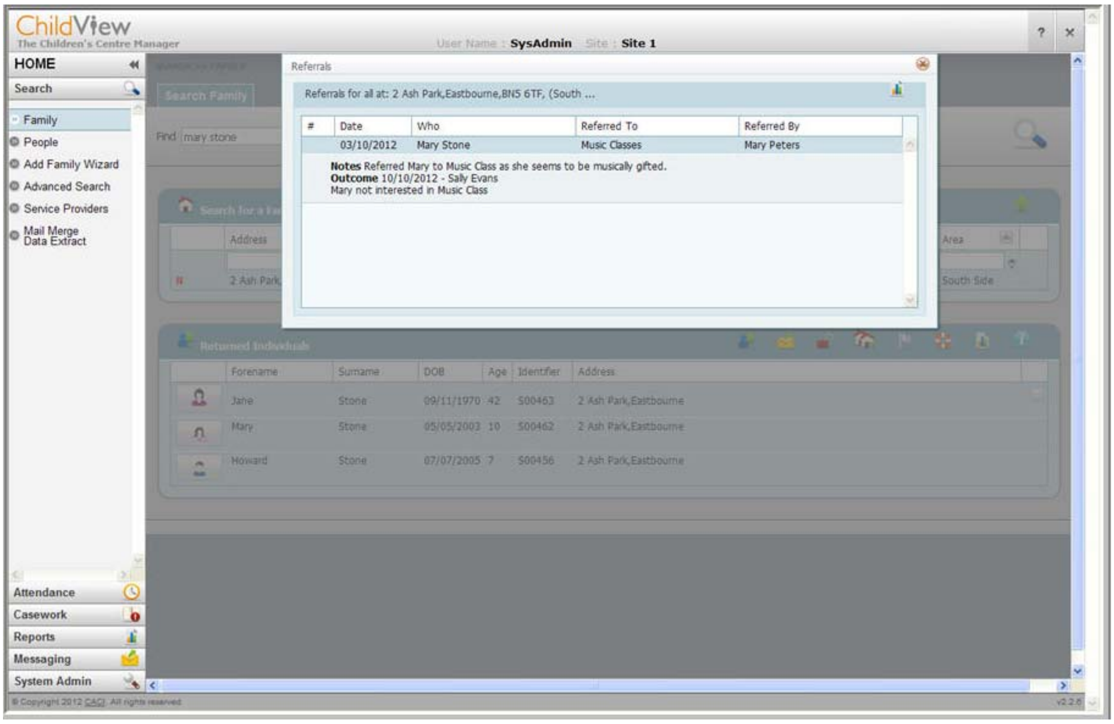
2.1. Via Family Search

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

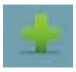
1. Click on the Search button in the Side Menu, then click the People option.
2. Search for the address/family for which you would like to see referrals.
3. Click on the an individual who lives at the address you are interested in to select it.
4. Click on the 'Family Referrals' icon () that will show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

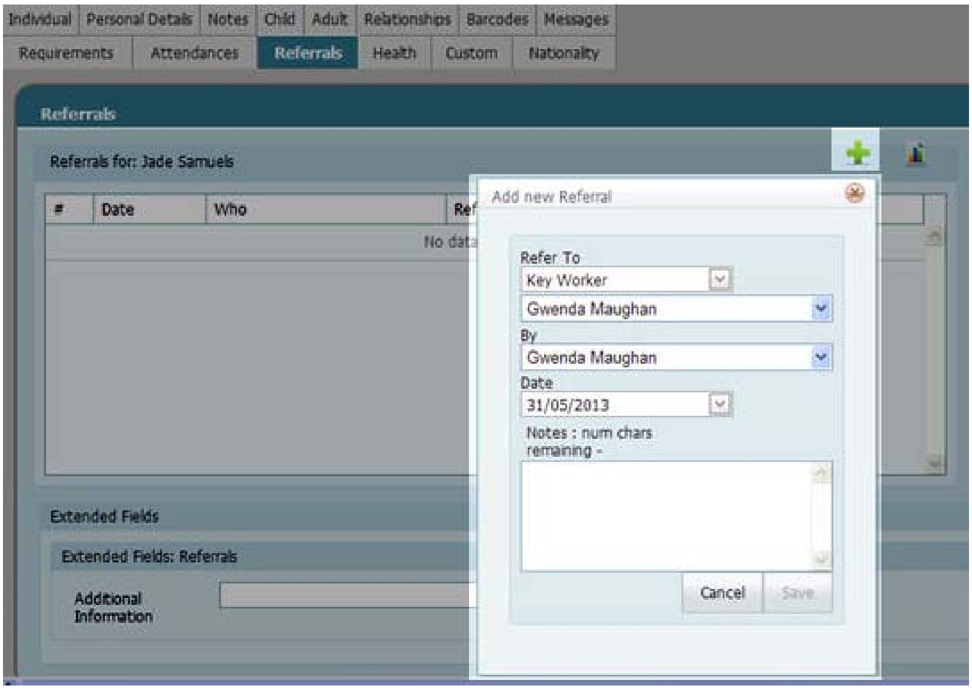
If referrals are in place for any person in that household, you will see a screen similar to this:



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.



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 Lessions.

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 ‘todays’ 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.

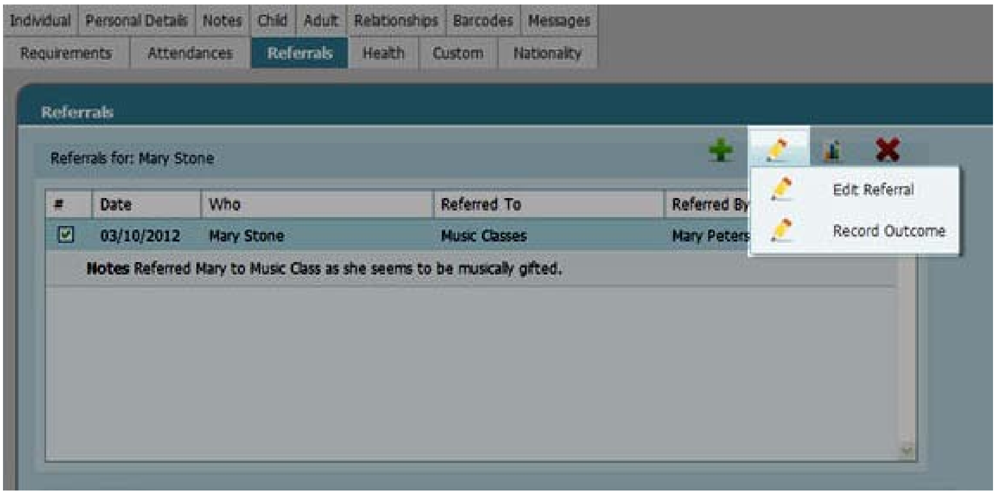
4. When you have completed all the fields mentioned above press the 'Save' button.

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.

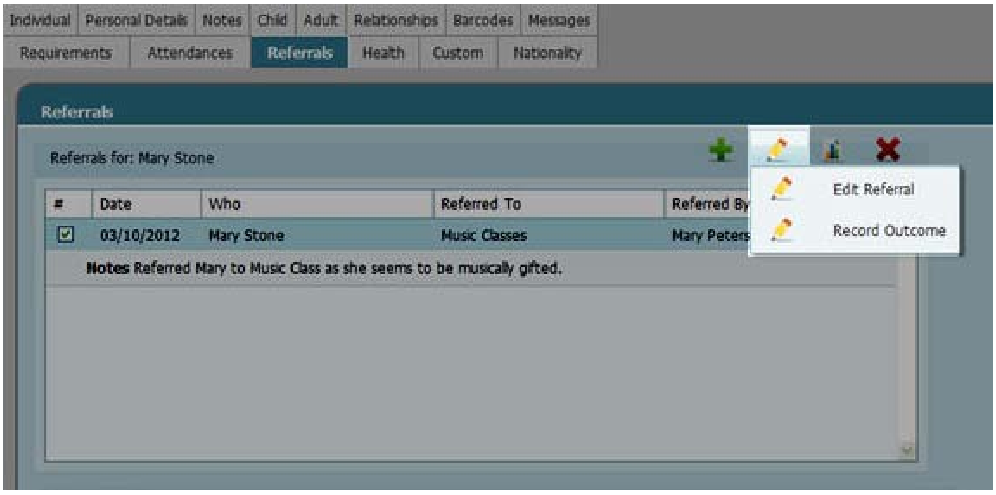
5.0 Recording outcomes

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.

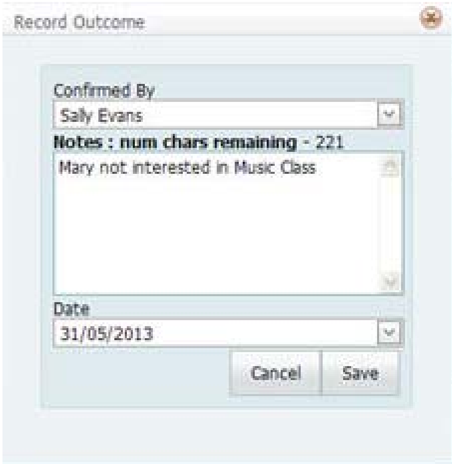
Outcomes can be recorded via the Individuals Full Details screen, from the Family search screen or from the People search screen.

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:



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.

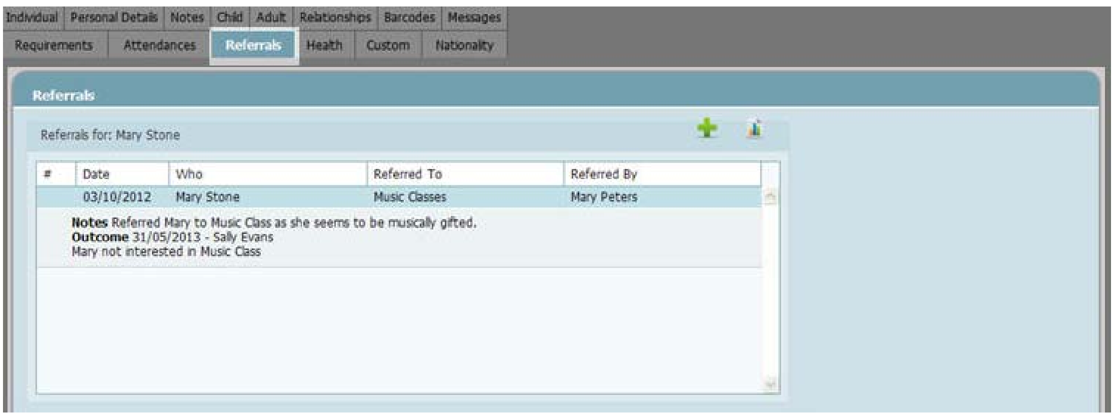
Notes

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.

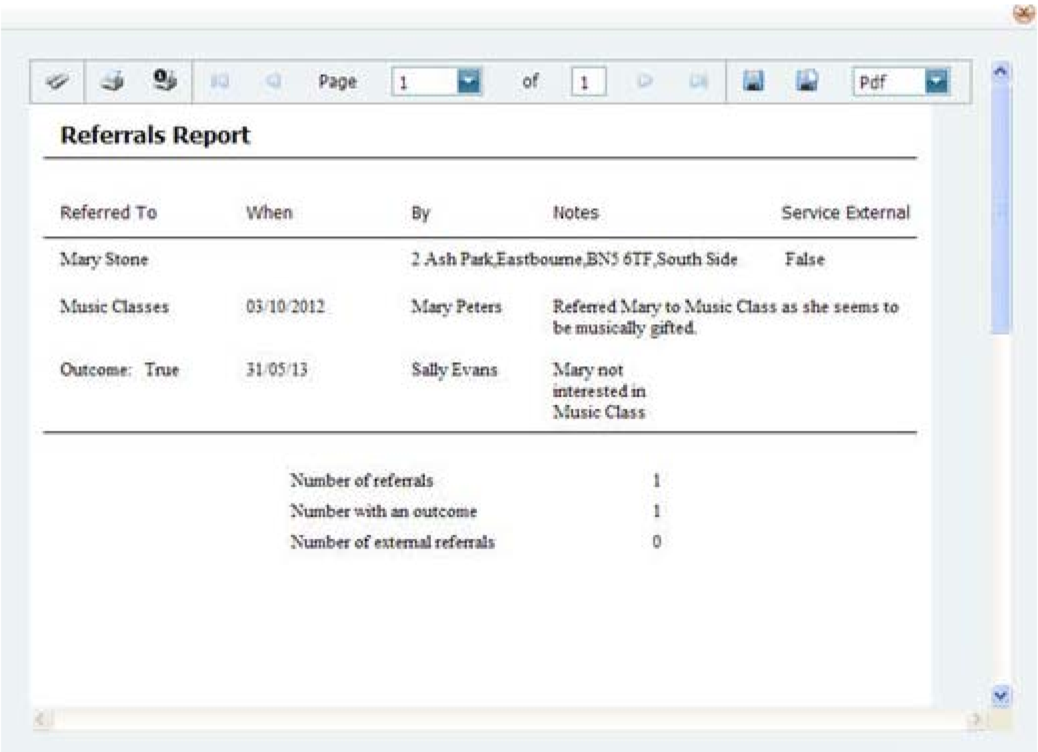
- Click the 'Save' button. You will be prompted to confirm that you wish to record the outcome as Referral cannot be edited or removed once an outcome has been added. Press the 'Save' button to confirm the outcome.
- The outcome will then appear in the referral summary table:



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:



Referrals Report

Referred To	When	By	Notes	Service External
Mary Stone		2 Ash Park,Eastbourne,BN5 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	

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.